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**CITRUS MARKETS AND MARKETING
IN WESTERN EUROPE,
1953**

by

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FOREWORD

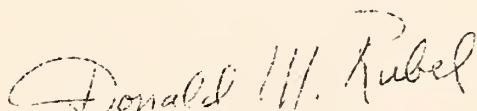
Western Europe, which, next to Canada, is the most important export customer of the United States citrus industry, is steadily increasing its consumption of citrus fruit, both fresh and processed. In this growing market United States processors and growers of citrus fruit have a share, but they meet there a growing competition, too, from the increased citrus production of other countries.

This study, which presents observations made at first hand on supply, demand, and marketing of citrus fruit and citrus products in that area in 1953, brings up to date (November 1953) the material in Foreign Agriculture Report No. 63, Some Aspects of Western Europe as a Citrus Market, published by the Office of Foreign Agricultural Relations in 1951. It also supplements circulars published by that Office on citrus markets in the individual countries of the area. It does not repeat the information on varieties, duties, and import costs that has already been published in Foreign Agriculture Report No. 63

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Because of the growing importance of processed citrus products in the export trade of the United States, this study includes, published here for the first time, data through December 1953 on United States exports of these products.

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Donald M. Rubel, Director
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Summary and Conclusions

In the nine countries of Western Europe--Belgium, Denmark, France, Western Germany, the Netherlands, Norway, Sweden, Switzerland and the United Kingdom--the market for fresh and processed citrus fruit is expanding. Among the factors contributing to this increase are the improved economic circumstances of many workers, such as urban wage earners, and farmers, and the accompanying changes in their diet.

The United States citrus industry, which shares with other producers in the growing European market, will meet more competition in all export varieties in the next 5 years. In fact, foreign production of almost every citrus fruit was much higher in 1952 than it had averaged in 1935-39 and will probably increase still more in the future.

There is room for even more expansion in Western Europe's consumption: Norway does not import citrus products the year round; Denmark and Norway are comparatively unacquainted with citrus juices; the United Kingdom is still a limited market due to restriction of dollar imports; consumers in the United Kingdom and France apparently would buy more if the supply were large enough to bring down prices, for even in the winter season retail prices are high.

The foreign-exchange problem remains the biggest single obstacle to the development of markets for United States citrus fruit in Europe. Many countries have improved their dollar position, but few are yet willing to make dollars available for citrus purchases. The possibilities for the application of the various compensation trading devices that for the past few years have assisted United States citrus exports to Western Europe are unlikely to be as good in 1954. The "bonus" or premium dollar schemes have been restricted or eliminated, as recommended by the International Monetary Fund. The so-called "switch" deals have been reduced in scope and frequency as a result of the generally more competitive situation that has developed: the dollar position in many countries has improved and many commodities have become more abundant not only in the dollar area but also in the soft currency areas. By these devices the problem of foreign exchange had been partly and temporarily met; with their importance reduced, other special arrangements or regular commercial transactions will have to be developed. This will be easier to accomplish in the economically stronger or more balanced countries like Western Germany and the Netherlands than in a country like France.

As to special arrangements, it should be noted that barter is always a difficult and uncertain means of trade and will handicap merchandizing campaigns to develop markets for the United States. As foreign aid is reduced, this problem will probably be accentuated.

In fresh citrus fruit, Europe's increased consumption has been practically all in oranges. Except for the United Kingdom and Norway, which have been importing less of all citrus fruit, Western Europe has greatly increased its imports of oranges since the war. Its growing demand for oranges has about kept pace with the increasing production of oranges in the Mediterranean, for no serious surplus has accumulated there. Its imports of lemons remain about the same; its imports of grapefruit have decreased.

United States exports of fresh oranges to Western Europe have increased considerably since the war--from an average of 1.6 million boxes in 1935-39 to 2.2 million in 1951-52. Percentagewise, however, the United States share in the Western European orange market in 1935-39 averaged 4.9 percent while in 1951-52 it was only 4.4 percent.

California supplies nearly all the export oranges, most of them summer fruit in small sizes. In the summer of 1953 California Valencias were noted as dominating the Continental markets. United States orange exports will continue to consist primarily of summer oranges from California; shipments from this source could increase to 5 million boxes a year, even with the United Kingdom continuing its restrictions against imports of United States citrus, but will be limited by the availability of foreign exchange. Some Florida oranges will be exported to Europe, chiefly in the spring, but the volume will depend on prices, the foreign exchange that is available, and the condition of the fruit delivered. Under favorable conditions, shipments from Florida could be expanded to 1 million boxes per year. Our exports of winter fruit could increase considerably if any reduction should take place in the winter supply from the Mediterranean.

United States exports of fresh lemons to Europe have decreased since the war: in 1935-39 they averaged 229,621 boxes; in 1951-52 they were 187,744. All have been supplied by California, in standard boxes and in half-box cartons, and have established a market at premium prices; most have been summer fruit. Year-round exports are a possibility, for premium prices are received in every European market; but winter exports would perforce be small because of the availability of Italian lemons. Even if the United Kingdom continues its restrictions, annual exports of fresh lemons from the United States to Europe will probably increase substantially in the next few years.

United States grapefruit exports, too, are smaller than they were before the war, having fallen from the 1935-39 average of 223,089 boxes to 197,079 in 1951-52. In the 1952-53 season they came from California, Florida and Texas: California supplied nearly all the summer fruit; Florida and Texas shared the small winter market. Small fruit predominated. Exports in 1954 probably will be divided equally between summer fruit from California and winter fruit from Texas and Florida.

United States processed citrus products compete in world markets in both price and quality; Western Europe, next to Canada, is our best export market for these products and will buy larger amounts in the future, of both industrial and consumer items. Some of the products, however—frozen concentrated orange juice, for example--will need intensive merchandising.

For citrus juices, the United States industry is still in initial stage of exports; even so it has achieved wide distribution of these products in the Netherlands, Belgium, Germany, Switzerland, Sweden, and part of France. Non-United-States canned juices find a market only in "sheltered" markets such as Denmark and the United Kingdom. The market for juices packaged for the consumer is continuing to expand in Belgium and Germany, but in the Netherlands there are indications of consumer resistance to single-strength juices. To develop further markets for itself, the United States industry will have to engage in intensive merchandising; one problem the merchandiser faces is the European preference for fresh fruit.

In 1952 Western Europe took 65 percent and 85 percent, respectively, of United States exports of single-strength orange juice and grapefruit juice; 32 percent and 98 percent of the hot-pack concentrated orange juice and grapefruit juice; 11 percent and 19 percent of the frozen concentrated orange juice and grapefruit juice; and 63 percent of the blended juices. Florida and California share about equally in the exports of the hot-pack concentrated juices, but Florida alone supplies nearly all the single-strength juices and the frozen concentrated orange juice. Florida juices, in fact, dominate the market wherever imports are made.

Frozen concentrated juices, though available in the Netherlands, Germany, Belgium, Sweden, and Switzerland, are selling slowly, perhaps chiefly because most homes lack refrigeration. At any rate, these products, though they need intensive merchandising, have a great potential market; the first successful development of it will doubtless be in hotels and restaurants.

The growing preference of Western Europe for high-quality soft drinks gives the United States industry a greater opportunity as a supplier of bottlers' bases. Increased exports of these products could offset reductions in our sales of concentrated orange juice to the United Kingdom Ministry of Food. Such reductions are in prospect, for the United Kingdom will probably soon be buying more juice from Spain, which now has new processing capacity and is likely to increase production.

Retail prices for fresh citrus remain rather high in most countries, indicating unsatisfied demand. Any reduction in Mediterranean supplies, under present conditions, would probably result in much higher retail prices in Western Europe. Prices for single-strength juices are low in countries where United States imports are permitted without restriction, as in Belgium and the Netherlands. But where restrictions are in effect--in England, Sweden, Denmark, and France--consumers pay a third to twice as much.

Some Western European countries have tried to protect their own deciduous-fruit industries; and their protectionism has somewhat helped the growth of Europe's citrus market by making the retail prices higher for the local fruit than for the imported citrus.

Eastern Europe is now entering the citrus market. It is making both direct purchases from North Africa, Israel, and Italy and indirect purchases through nonproducing countries. This additional market will be an important factor in maintaining prices in Western Europe.

Transit trading in citrus will probably quicken its tempo in 1954, owing to the combined effect of better economic conditions in Western Europe and the growing interest of Eastern Europe in citrus.

United States Citrus Districts in Export Trade

Each citrus district in the United States--California, Arizona, Florida, and Texas--has a somewhat different stake in the export market. California and Arizona are concerned primarily with fresh fruit; Florida, with processed products; and Texas, with both fresh and processed fruit--at least it was so in the past, when production was normal and not reduced by drought and the freeze.

In the following analysis of the export trade of each district in each kind of citrus fruit, export figures are those for the 1952-53 season (for the year ending October 3, 1953) under the export-payment program of the Production and Marketing Administration of the United States Department of Agriculture.^{1/}

Fresh Oranges

California . . .	3,751,246 boxes
Florida . . .	115,148 boxes

Most of California's exports consist of Valencias, sizes 288 and 344, shipped from May through September. These exports are important to California since they are an outlet for small fruits, which are exceptable in most European markets and are in surplus supply in California.

^{1/} Note that these are not total exports since they include only the exports to countries in the export-payment program; therefore exports to Canada, the Orient, and South Africa are not shown. Total exports of processed products, however, are given in the section on United States exports, by months and country of destination.

California fruit in the European summer market meets its biggest competition from South African Navels and Valencias. Some Brazilian Pera oranges also are in the market at the same time.

Florida's comparatively small share in the European fresh-orange market owes principally to two circumstances. First, the orange season in Florida occurs at about the same time as that in the Mediterranean countries. Second, Florida fruit does not keep so well as California fruit in long-distance shipping; some Florida varieties, such as the Hamlin, though satisfactory for the domestic market, cannot be successfully exported. Most Florida exports are Valencias, shipped from March through May. Florida oranges are exported in a larger box than California oranges, and the selection is usually of larger fruits.

Texas oranges, which are of about the same type as Florida oranges and have about the same season, are not likely to be exported in large quantities when Texas production is re-established.

California summer Valencias, because their types and season give them an advantage in the European market, will doubtless continue to predominate in United States orange exports. Under favorable conditions, Florida could export much larger quantities than it has hitherto but is not likely to ship more than one-half as much as California.

Fresh Grapefruit

California-Arizona	121,424 boxes
Florida	23,703 boxes
Texas	23,471 boxes

California, which supplied most of the exports to Europe in the 1952-53 season, makes its shipments from May through August, at a time when most other citrus-producing areas have no fruit. Competition comes from grapefruit grown in the Southern Hemisphere, primarily South Africa. Arizona fruit is usually exported somewhat earlier than California fruit.

Texas and Florida exports are made in the winter season, from December through April, and thus in Europe have to meet competition from the Mediterranean areas, primarily from Israel. When Texas grapefruit production becomes more normal than it is at present, winter exports from that district may increase and exceed the volume of summer exports from California. If exports could be made to the United Kingdom, Texas and Florida together could export as much as 1 million boxes of winter fruit.

In their exports to Europe the United States grapefruit growers find an outlet for small-sized fruits -- 90's to 126's -- which are not popular in the United States but are preferred in Europe.

Fresh Lemons

Since fresh lemons were not included in the 1952-53 export-payment program, no comparable export figures are now available from this source. All United States exports are supplied by California, which is increasing

its production. By exporting the fruit fresh, growers get higher returns from it than they would if they processed it.

Shipments to Europe have been made only in the summer, from May to September, when foreign producing areas are in short supply. Italian Verdelli lemons, Spanish Verna lemons, and lemons from Chile compete with United States fruit in European summer markets.

Processed Products

Of processed citrus products other than the concentrated juices, Florida is the principal exporter, as the following tabulation of 1952-53 exports to Europe indicates (cases contain 24 No. 2 (20-ounce) cans):

<u>Product</u>	<u>Florida</u> (cases)	<u>California-Arizona</u> (cases)
Single-strength orange juice	330,953	5,701
Single-strength grapefruit juice	270,819	415
Single-strength blended juice	62,295	-
Grapefruit sections	6,381	-
Citrus salad	307	-

These products give Florida an important outlet for its growing citrus-processing industry. Most shipments are made from December through June, following the opening of the main Florida canning season, about the first of December. Foreign competition in the juices comes primarily from the West Indies, Israel, and South Africa, but some comes also from North Africa, Australia, Spain and Italy. Competition in the grapefruit sections and citrus salad comes primarily from Israel; the West Indies and South Africa also can small quantities.

Concentrated products were exported to Europe as follows in 1952-53

<u>Concentrated Product</u>	<u>Florida</u> (Gallons)	<u>California-Arizona</u> (Gallons)
Hot-pack orange juice (60° Brix)	179,400	210,156
Preserved orange juice (60° Brix)	-	9,080
Frozen orange juice (42° Brix)	47,520	-
Hot-pack grapefruit juice (55° Brix)	22,589	24,174

Exports of the hot-pack concentrated orange juice are sold as bottlers' bases to the soft-drink industries of Europe and to the British Ministry of Food for the child health program. In 1952-53 exports of this product to Europe were of nearly equal importance to California-Arizona and Florida. In California this product offers an outlet for Navel orange juice, which is desirable in England because of its high ascorbic-acid content. In both

California-Arizona and Florida it is an outlet for surplus oranges and, since it offers an additional opportunity to absorb fixed expenses, reduces processing costs. Although the concentrate may be sold all year, shipments are usually made from about December to June. Foreign competition with the United States comes from Israel, the West Indies, and Spain; there are also some supplies in South Africa and Italy.

Exports to Europe of the preserved concentrated orange juice, which also is used by the soft drink industry, were supplied entirely by California and Arizona, probably largely because of the bright color of the juice produced in those districts. This concentrate is widely produced in foreign countries, major suppliers of Europe are Spain, Italy, North Africa, and Israel.

United States exports of the frozen concentrated orange juice to Europe in this period were supplied entirely by Florida, the largest producer in the United States. Shipments, though they may be made at any time of the year, are more likely to be made from December to June, to supply the summer market. In 1953 only Spain was producing frozen concentrate; but in 1954 England too will probably produce some, from imported fruit.

Exports to Europe of concentrated grapefruit juice which is used by the soft-drink industry, were about of equal importance to Florida and California-Arizona in 1952-53. This product affords an outlet for surplus grapefruit of sizes and qualities that cannot be shipped as fresh fruit. Shipments may be made at any time during the year, but most of them are made in the spring from Florida and in the spring and summer from California and Arizona. Israel and the West Indies are the primary sources of competition with the United States product.

Lemon products were not included in the 1952-53 export program. Any exports that were made in that year were supplied by California. Shipments may be made at any time during the year, but most shipments are made in the spring to supply the soft-drink industry for its summer output. Foreign lemon products competing with United States products are produced primarily in Italy and Spain.

Non-United-States Sources of Supply for Western Europe

To evaluate United States export potentials in Western Europe in terms of the competition our fruit will meet there, it is necessary to consider what citrus supplies are available to that market from sources other than the United States.^{2/}

^{2/} The tables and figures that follow as an appraisal of supplies available to Western Europe bring up to date (November 1953) the similar data in Some Aspects of Western Europe as a Citrus Market, by the Office of Foreign Agricultural Relations (now the Foreign Agricultural Service), U.S. Department of Agriculture, For. Agr. Rpt. 63, August 1951.

Oranges

Winter fruit. - Western Europe receives its winter oranges, which are marketed from November through May, principally from Spain, Italy, Israel, French Morocco, and Algeria (table 1). Total production in these countries in 1952 was 12 million boxes larger than it had been 2 years before, and nearly 30 million boxes than it had averaged before the war, in 1935-39. Substantial increases over the prewar production figures have been made not only by the traditional orange-growing countries--Spain and Italy--but by Morocco and Algeria, which did not become important sources until after the war. Only in Israel has the postwar production yet to reach the prewar level.

Table 1.—Oranges: Production by principal suppliers to Western Europe, other than the United States, average 1935-39 and 1945-49, annual 1948-52
(In thousand boxes)

Country	1935-39 average	1945-49 average	1948	1949	1950	1951	1952 1/
:							
: WINTER ORANGES							
Spain.....:2/	24,167	22,601	25,168	20,662	29,009	33,491	40,464
Italy.....:10,003	10,240	12,046	9,776	17,411	15,333	17,313	
Israel.....:3/	8,652	8,304	6,300	5,020	6,888	6,708	7,000
French Morocco...:2/	927	2,610	3,244	4,031	4,284	5,099	5,384
Algeria.....:1,763	3,323	4,281	4,727	5,697	5,614	5,054	
Total.....:	45,512	47,070	51,039	44,216	63,289	66,245	75,215
:							
: SUMMER ORANGES							
Brazil.....:34,466	33,152	35,138	35,674	28,500	26,800	30,000	
South Africa....:4,000	5,542	5,863	6,411	6,389	5,113	5,574	
Total.....:38,466	38,694	41,001	42,085	34,889	31,913	35,574	

1/ Preliminary.

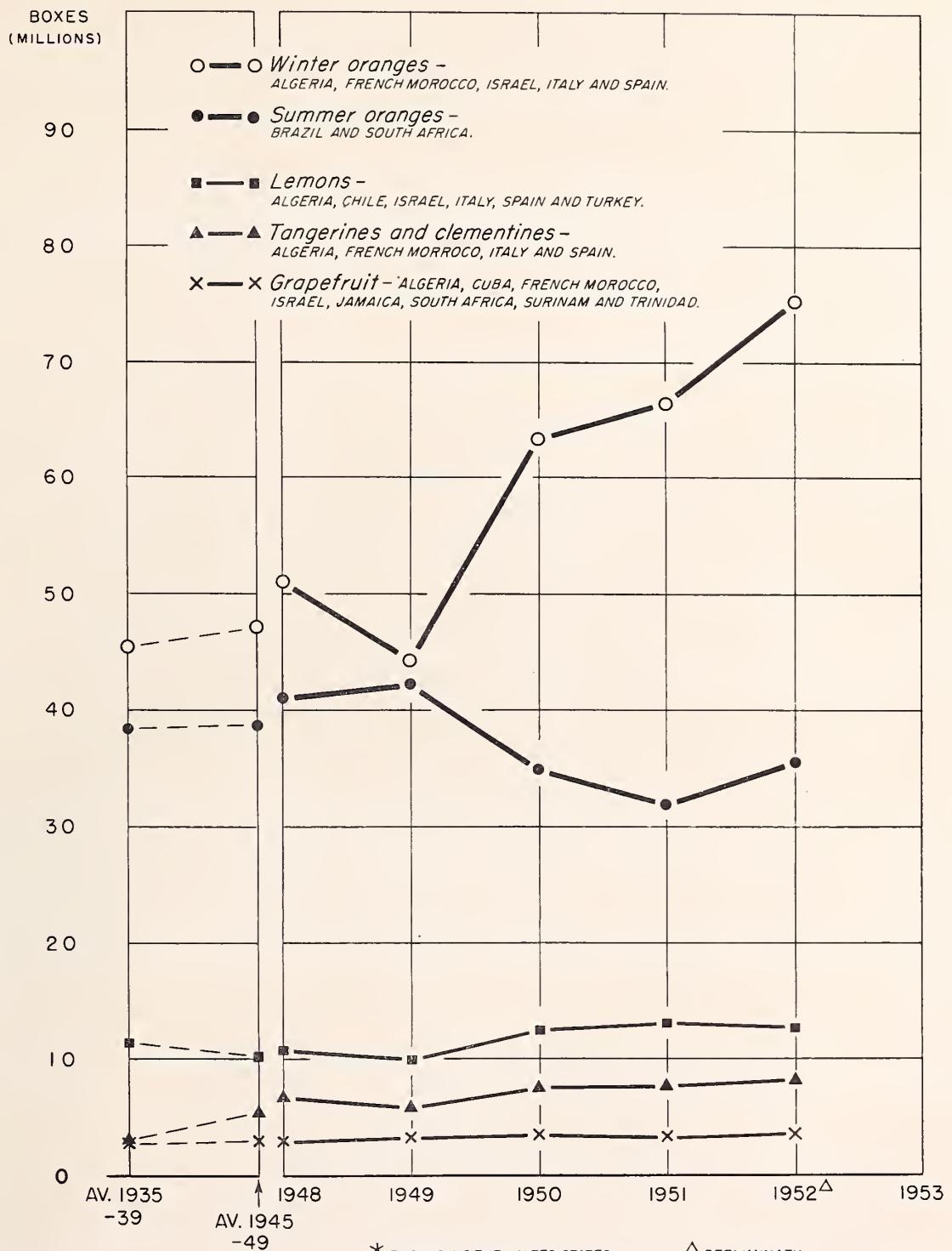
2/ Includes tangerines.

3/ Palestine.

Source: Compiled from official figures.

Even though domestic consumption is increasing in these countries, their production is increasing enough to make larger quantities of fruit available for export. In all five countries extensive plantings have been made, which will come into production in the near future. If favorable climatic conditions prevail, total production in 1953-54 can reach 87 million boxes. And by 1955-56 the production of oranges from these five major Mediterranean sources may reach 94 million boxes--double the prewar average--with Spain harvesting 50 million boxes; Italy, 22 million; Israel, 9 million; French Morocco, 7 million; and Algeria, 6 million. The frost hazard in Spain, however, makes this potential unlikely to be realized.

PRODUCTION OF WINTER AND SUMMER ORANGES AND
OTHER CITRUS FRUITS BY PRINCIPAL SUPPLIERS*
TO WESTERN EUROPE, 1935-52



* EXCLUDING THE UNITED STATES.

△ PRELIMINARY.

Summer fruit. - Countries other than the United States that supply Western Europe with summer oranges (May to November) are chiefly Brazil and South Africa. Unlike the sources of winter oranges, these two sources did not produce as much in 1952 as they had before the war; that they were about 3 million boxes short of the prewar average is the result of decreased production in Brazil.

As a source of supply for Europe, South Africa is more important than Brazil, for a much larger percentage of its fruit is available for export to Europe. Besides, South African oranges have better natural keeping qualities than the Brazilian fruit and are therefore more suitable for export.

New plantings in both Brazil and South Africa will probably increase the production of summer oranges in the future. By 1955 total production may reach 40 million boxes; by 1960 South Africa expects to produce about $7\frac{1}{2}$ million boxes. Despite expectations, however, total production from the two areas in the near future will probably be less than 45 million boxes.

Tangerines and Clementines

Tangerines and clementines, early citrus varieties, are supplied to Western Europe by Mediterranean countries, chiefly Italy, Algeria, Spain, and French Morocco (table 2). Total production in these areas was 5 million boxes larger in 1952 than it had been before the war (1935-39 average). In all countries except French Morocco, production in 1952 was much greater than the average for 1945-49--in Spain it had even doubled.

Table 2.—Tangerines and clementines: Production by principal suppliers to Western Europe, average 1935-39 and 1945-49, annual 1948-52
(In thousand boxes)

Year	Italy	Algeria	Spain	French Morocco	Total
Average:	:	:	:	:	:
1935-39.....	1,697	1,405	1/	1/	3,103
1945-49.....	1,999	1,650	1,211	371	5,231
Annual:	:	:	:	:	:
1948.....	2,555	2,548	1,109	409	6,621
1949.....	2,362	1,998	923	504	5,787
1950.....	2,944	2,436	1,550	554	7,484
1951.....	2,668	2,571	1,779	559	7,577
1952 2/.....	2,845	2,244	2,519	560	8,168

1/ Included with oranges.

2/ Preliminary.

Source: Compiled from official figures.

New plantings have been made in all four areas particularly in Italy, where, on the island of Sicily, tangerines have been interplanted with lemons as a hedge against the disease mal secco (tangerines are resistant to this disease, which is so destructive in lemon groves). If weather conditions are favorable, total production of tangerines and clementines in these areas may be expected to increase to 10 million boxes by the 1955-56 crop year, to more than the three times 1935-39 average.

Increased production of these fruits, however, may soon result in surpluses. Such surpluses could not easily be disposed of, for neither tangerines nor clementines are suitable for large-scale processing.

Lemons

Western Europe gets its supplies of non-United-States lemons from widely separated areas but most of them from Italy (table 3). Spain, Algeria, Israel, and Turkey furnish fruit to special European markets.

Lemons from these sources are most abundant from November through May; Turkey, for example, ships only in the winter. But some summer lemons also come from these sources: Spain, for instance, is the largest supplier of Verdelli lemons; Spain supplies Vernas chiefly. The lemons received from Chile are all summer lemons.

Total production in these six areas was more than 1 million boxes larger in 1952 than it had been in 1935-39. Most of this increase occurred in Chile and Turkey; Italy, the major producer, produced less than the prewar average. Chile is an increasingly important producing area; its 1952 crop was nearly twice its average for 1945-49. Chile, however, now exports only a small percent of its production to Europe; and therefore the supply of lemons available to Europe from non-United-States sources in 1952 was about the same as it had been in 1935-39. This fact, in the face of the growing population in the market area, means that the supply per capita available from these sources is now less than it was before the war.

The supply of lemons from Italy probably will not exceed 12 million boxes per year through 1955. The disease mal secco continues to destroy groves in that country; but new plantings are nonetheless being made. New resistant varieties are being planted; but some, such as the Monachello, produce less fruit and a fruit that is not particularly well-suited for processing.

New plantings in Spain, Chile, and Turkey also will increase Europe's lemon supplies to some extent.

Table 3---Lemons: Production by principal suppliers to
Western Europe, other than the United States,
average 1935-39 and 1945-49, annual 1948-52

(In thousand boxes)

Year	Italy	Spain	Chile	Algeria	Israel	Turkey	Total
Average:							
1935-39	9,637	1,445	250	102 ^{1/}	88	73	11,595
1945-49	7,483	1,108	915	131 ^{2/}	317	260	10,214
Annual:							
1948....	8,015	812	1,167	159	250	359	10,762
1949....	7,371	870	1,146	186	130	244	9,947
1950....	8,931	1,378	1,500	244	172	193	12,418
1951....	8,658	1,740	1,600	291	254	421	12,964
1952 2/..	8,373	1,508	1,700	266	267	500	12,614

1/ Palestine.

2/ Preliminary.

Source: Compiled from official figures.

Total production in these areas, even if weather is favorable, is not likely to exceed 18.1 million boxes in 1955. Of this quantity, Italy would probably produce 12 million boxes; Spain, 2.5 million; Chile, 2 million; Algeria and Israel, 300,000 each; and Turkey, 1 million. Considering the rate of increase in recent years, this estimate is probably generous.

Grapefruit

Grapefruit is the least important citrus variety in Europe. Western Europe receives the fruit from many sources besides the United States (table 4): In the winter it is supplied by Israel, the West Indies, and North Africa; in the summer, mostly by South Africa and to a small extent by Surinam.

Total production in these areas has increased some since the war. In 1952 the crop was 700,000 boxes larger than in 1935-39 although the crop in Israel, the only large producer, was slightly less than the prewar average. New plantings in Israel, South Africa, Trinidad, and Morocco, may increase production, but total production is not likely to exceed 4 million boxes by 1955.

Table 4.—Grapefruit: Production by principal suppliers to Western Europe, other than the United States, average 1935-39 and 1945-49, annual 1948-52

(In thousand boxes)

Year	Israel	South Africa	Trinidad	Jamaica	Cuba	Surinam	Morocco	Algeria	Total
Average:	:	:	:	:	:	:	:	:	:
1935-39: 1/	1,445	495	174	213	375	9	10	9	2,730
1945-49: 1/	1,141	760	390	336	138	50	46	26	2,887
Annual:	:	:	:	:	:	:	:	:	:
1948	1,068	828	194	421	150	100	55	24	2,840
1949	1,100	792	579	355	170	68	83	29	3,176
1950	1,240	789	600	300	190	100	110	67	3,396
1951	1,201	632	600	350	230	100	57	47	3,217
1952 2/	1,420	689	600	350	175	100	64	31	3,429

1/ Palestine.

2/ Preliminary.

Source: Compiled from official figures.

Citrus Imports into Western Europe

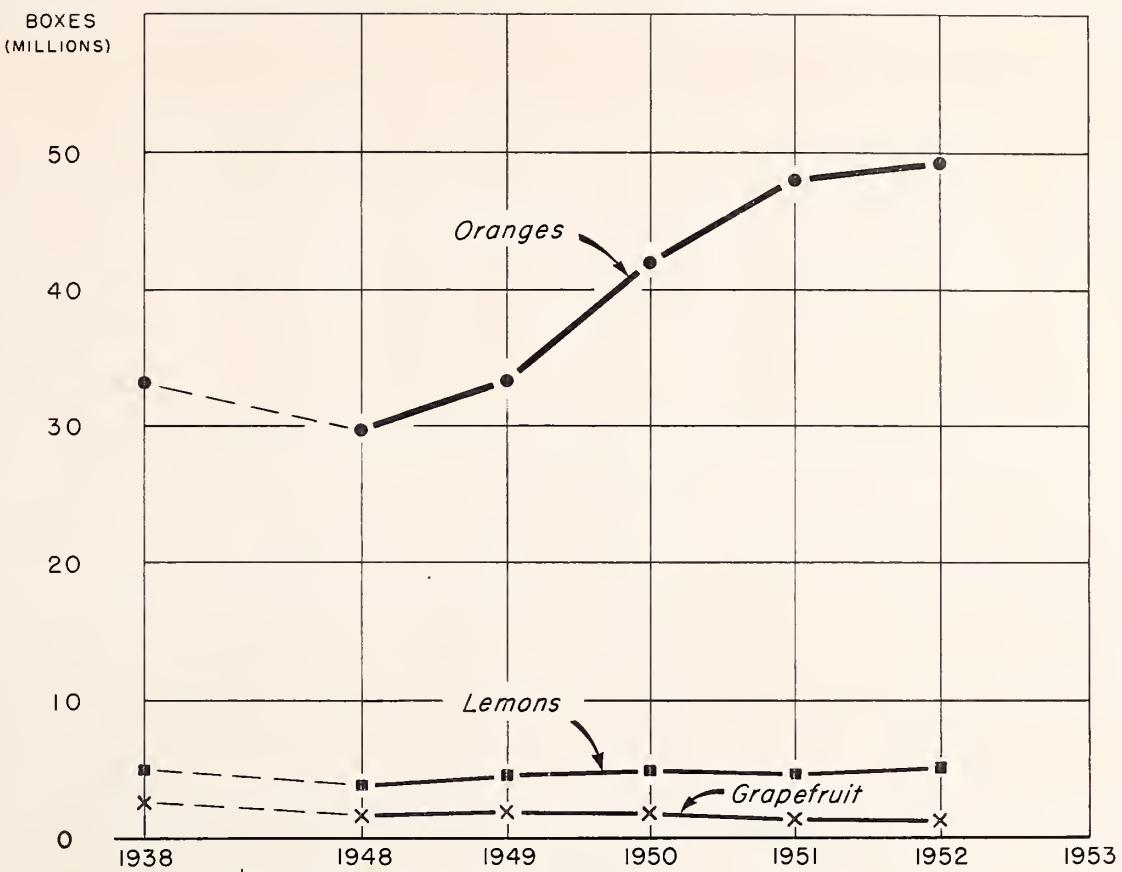
Oranges

Total imports of oranges into Western Europe have been rising steadily in the past few years; by 1952 they had reached a total of 49 million boxes, 49 percent more than in 1938 (table 5). All but three of the nine countries had shared in this increase: France and Germany had more than tripled their imports and Denmark had come close to doing so; Switzerland and Sweden had doubled theirs; and Belgium had increased by a third. The Netherlands remained practically the same; Norway, though it declined, declined only a little.

Only the United Kingdom imported substantially less—38 percent less. It is interesting to consider that, if the United Kingdom had followed the pattern set by the other countries of Western Europe, total imports of oranges into those countries would have reached 60 million boxes in 1952.

In 1938 the United Kingdom had been far and away the largest European importer of oranges. France had been second and Germany third, although trade sources indicate that German imports were actually higher than the official figure shown in table 5. By 1952 France and the United Kingdom had exchanged places; and, when 1953 import statistics are available, they will indicate still another shift, of the United Kingdom down to third place. Positions of these three countries will probably change again in 1954, making Germany first but still keeping the United Kingdom third.

IMPORTS OF ORANGES, LEMONS AND GRAPEFRUIT
INTO NINE COUNTRIES* OF WESTERN EUROPE



* BELGIUM, DENMARK, FRANCE, GERMANY, NETHERLANDS, NORWAY, SWEDEN,
SWITZERLAND AND UNITED KINGDOM.

Table 5.—Oranges, lemons, and grapefruit: Imports into countries of Western Europe, 1938 and 1948-52

(In thousand boxes)

Country	1938	1948	1949	1950	1951	1952
ORANGES						
Belgium.....	2,417:	3,128:	2,677:	3,007:	3,669:	3,368
Denmark.....	316:	131:	552:	569:	673:	818
France.....	5,779:	7,590:	12,386:	13,620:	15,681:	17,402
Germany 1/.....	2,708:	52:	2,651:	7,708:	7,784:	9,447
Netherlands....	2,383:	1,110:	1,455:	1,920:	2,493:	2,381
Norway 2/.....	895:	265:	308:	508:	542:	785
Sweden.....	1,338:	1,394:	1,989:	2,352:	2,624:	2,823
Switzerland....	720:	1,563:	1,496:	1,568:	1,848:	1,836
United Kingdom.:3/	16,551:	14,627:	9,696:	10,751:	12,664:	10,316
Total.....	33,107:	29,860:	33,210:	42,003:	47,978:	49,176
LEMONS						
Belgium.....	174:	301:	289:	260:	258:	264
Denmark.....	90:	182:	145:	114:	117:	122
France.....	715:	993:	1,179:	1,065:	1,135:	1,254
Germany 1/.....	1,747:	234:	1,306:	1,737:	1,454:	1,968
Netherlands....	156:	46:	88:	147:	127:	123
Norway.....	4/	4/	4/	4/	4/	4/
Sweden.....	67:	150:	136:	125:	140:	126
Switzerland....	358:	395:	441:	491:	504:	508
United Kingdom..	1,537:	1,336:	948:	907:	824:	789
Total.....	4,844:	3,637:	4,532:	4,846:	4,559:	5,154
GRAPEFRUIT						
Belgium.....	248:	192:	183:	150:	182:	155
Denmark.....	19:	-:	32:	12:	21:	21
France.....	130:	41:	51:	91:	139:	132
Germany 1/.....	88:	5/	11:	52:	18:	21
Netherlands....	86:	32:	37:	48:	37:	45
Norway.....	4/	4/	4/	4/	4/	4/
Sweden.....	61:	47:	52:	48:	48:	36
Switzerland....	-:	-:	-:	-:	-:	-
United Kingdom.:3/	1,963:	1,419:	1,502:	1,465:	1,110:	1,023
Total	2,595:	1,731:	1,868:	1,860:	1,555:	1,433

1/ Western Germany, except 1938.

2/ All citrus.

3/ Net trade.

4/ Included in figure for oranges.

5/ Less than 500 boxes.

Source: Compiled from official figures.

The decline of orange imports into the United Kingdom and Norway owes chiefly to restrictions imposed to conserve foreign exchange.

Lemons

Imports of lemons into Western Europe were only about 300,000 boxes larger in 1952 than they had been in 1938 (table 5). Belgium, Denmark, France, Germany, Sweden, and Switzerland had increased imports; the Netherlands and the United Kingdom had decreased them. The only marked change occurred in the United Kingdom, which imported only about half as many boxes as in 1938. Exchange controls in the United Kingdom will probably continue to restrict imports, which could be expanded in any significant amount only by imports from the United States since the Mediterranean supplies of lemons continue to be limited.

Grapefruit

Imports of grapefruit into Western Europe in 1952 were only 55 percent of what they had been in 1938 (table 5). Most of this decrease was in the imports to the United Kingdom, which had been reduced by half, from 2 million boxes to 1 million. Although exchange restrictions and small supplies in Israel have caused this reduction in the United Kingdom, grapefruit imports have declined also in countries where there is little or no restrictions on imports. In Belgium, the Netherlands, and Sweden, imports in 1952 were less than in 1938. Grapefruit has not been a popular fruit in continental Europe.

Transit Trading and Future Imports

Transit trading is an important factor in European imports of citrus fruit. If citrus supplies can be shifted from one country to another, many disastrous surpluses can be avoided and markets can be kept more evenly supplied. Although this is true of all citrus imports, it applies even more to imports from the United States that involve dollar payments resulting from compensation trading through a third country. Such transactions are handled by transit trading and are an important factor in expanding citrus trade in Western Europe.

In the 1953-54 season Russia, Poland, Austria, Eastern Germany, and Czechoslovakia are purchasing citrus direct from Israel, Italy, and North Africa. In addition, trade sources indicate, that these countries are likely to obtain citrus supplies in Western European markets through transit trading, made possible by compensation and barter payment. In 1954, transit business is likely to be on an expanded basis, including both Eastern and Western Europe. The expanding Eastern European business may be the most important factor in marketing citrus in Europe in 1954.

United States Exports of Fresh and Processed
Citrus Fruit to Western Europe

In studying the data given in this section, the reader should keep in mind that United States exports to a country are not always identical with that country's imports for consumption from the United States, for much of our exported citrus is disposed of in Europe through transit trading. Data for Belgium and the Netherlands, in particular, reflect such trading.

Fresh fruit

Oranges.--United States exports of fresh oranges, including tangerines, to Western Europe in 1951-52 were nearly one-third larger than they had averaged in 1935-39--an increase of $\frac{1}{2}$ million boxes (table 6). This increase was accomplished without our largest prewar market, the United Kingdom, which had taken an average of 884,210 boxes a year in 1935-39 but nothing in 1951-52. Remarkable increases took place in our exports to Belgium, Western Germany, the Netherlands, and Sweden.

On a percentage basis, however, our exports in 1951-52 were smaller than they had been in 1935-39: in the prewar years the United States had supplied 4.9 percent of Western Europe's orange market; in 1951-52 it supplied only 4.4 percent.

Grapefruit.--Exports of fresh grapefruit from the United States to Western Europe were about 30,000 boxes less in 1952 than they had averaged during 1935-39, a decrease of approximately 15 percent (table 6). Exports to Belgium and the Netherlands increased while those to France, Germany, Norway, Sweden, and the United Kingdom decreased. The small exports to Norway and the United Kingdom were probably for our armed forces. Continued restriction on imports by the United Kingdom deprives us of what was our largest prewar grapefruit market.

Lemons.--United States exports of fresh lemons to Western Europe also declined between 1935 and 1952, by approximately 17 percent (table 6). When data are available for the 1952-53 season, it is likely that they will show lemon exports twice those of the previous season.

The United Kingdom was once our largest lemon market; but from it we have been excluded in the postwar years. Increased exports to Belgium and the Netherlands have partly made up for the loss of our market in the United Kingdom.

Table 6.—Oranges, grapefruit, and lemons: United States exports to countries of Western Europe, average 1935-39 and 1945-49, annual 1949-50 - 1951-52

Country	1935-39	1945-49	1949-50	1950-51	1951-52
	average	average	average	average	average
; ORANGES, YEAR BEGINNING NOVEMBER 1 (BOXES) 1/					
Belgium and Luxembourg	101,418	699,304	692,938	806,445	671,458
Denmark	2/	3/ 337	-	-	14
France	220,353	20,571	-	321,547	169,231
Germany 4/	39,181	1,652	8,258	-	313,684
Netherlands	152,605	119,213	283,010	474,397	712,032
Norway	133,235	1,154	2,166	1,638	2,442
Sweden	94,950	180,330	-	26,299	183,350
Switzerland	2/ 5/ 72,028	76,635	105,370	110,697	
United Kingdom	884,210	4,418	1,786	-	-
Total	1,625,952	1,099,007	1,064,793	1,735,696	2,162,908
; GRAPEFRUIT, YEAR BEGINNING SEPTEMBER 1 (BOXES)					
Belgium and Luxembourg	5,484	186,193	65,887	130,820	73,485
Denmark	2/	3/ 38	38	13	16
France	18,216	14	22	29,332	8,606
Germany 4/	6,235	71	204	23	5,234
Netherlands	10,837	17,891	20,246	28,265	40,001
Norway	6,977	428	694	755	1,133
Sweden	4,484	29,631	464	9,467	344
Switzerland	2/ 5/ 29,361	13,632	28,847	68,116	
United Kingdom	175,856	100,058	-	160	144
Total	228,089	363,685	101,187	227,682	197,079
; LEMONS, YEAR BEGINNING NOVEMBER 1 (BOXES)					
Belgium and Luxembourg	23,914	5/ 9,108	9,326	67,184	91,315
Denmark	2/	2/	-	-	-
France	6/ 35,049	2/	-	9,104	-
Germany 4/	2/	2/	-	-	24,560
Netherlands	9,717	3/ 5,450	5,450	24,934	68,414
Norway	2/	-	-	-	-
Sweden	2/	3/ 2,500	-	-	-
Switzerland	2/	2/	-	300	2,784
United Kingdom	160,941	45	-	-	671
Total	229,621	17,103	14,776	101,522	187,744

1/ Includes tangerines.

2/ Not available.

3/ For 1 year only.

4/ Western Germany, except for 1935-39.

5/ 4-year average.

6/ 2-year average.

Processed Citrus Products

Processed citrus products have become increasingly important in international trade since the war. Because the products of the United States are highly competitive with those of other areas, in both price and quality, our exports of these items will probably increase in the future.

As a guide to the United States processing industry in regard to the scope and comparative importance of export markets, data are given here on recent United States exports of the most important products. Except for grapefruit segments, data are monthly for 1952 and 1953 and cover not only exports to Western Europe but also exports to all other destinations. It is hoped that this detail, although given for only two years, will be useful, particularly in showing absence or presence of a seasonal pattern of exports.

The small exports indicated to countries where trade restrictions prevent imports, such as the United Kingdom, Denmark, and Norway, are probably shipments to either United States armed forces or to official personnel stationed abroad.

Grapefruit segments.—United States exports of grapefruit segments to Western Europe had fallen to 151,000 pounds in 1952, less than one-half of 1 percent of our prewar average (table 7). This tremendous decline is the result of our exports being excluded from the United Kingdom, which before the war took nearly all of our exports of grapefruit segments.

The United Kingdom offers the greatest opportunity for increasing our exports of this product. Our exports to the United Kingdom could be as high as 750,000 cases of 24 No. 2 cans the first year restrictions are lifted.

Although our 1952 exports of grapefruit segments were small, those to Belgium, Germany, Sweden, and Switzerland have increased over the prewar level.

Editor's note.—Since this report was written, late in 1953, it has been possible to supply monthly data on processed products for all of 1953. The text, however, is based on 1952, the latest year for which full data were available at the time of writing.

Table 7.—Grapefruit segments: United States exports to countries of Western Europe, average 1935-39 and 1945-49, annual 1949-52

Country	(In pounds)						1952
	1935-39 average	1945-49 average	1949	1950	1951	1952	
Belgium and Luxemburg..	4,666	354,324	47,770	24,810	46,787	62,280	
Denmark.....	1,101	-	-	3,750	6,000	1,200	
France.....	18,396	43,552	-	9,000	18,000	-	
Germany 1/.....	13,358	156	-	-	-	20,000	
Netherlands.....	47,534	12,720	-	-	40,380	35,821	
Norway.....	48	284	-	-	-	-	
Sweden.....	12,302	24,600	-	-	-	16,650	
Switzerland.....	270	50,988	3,000	5,425	204,360	6,000	
United Kingdom.....	35,118,918	8,331,544	-	-	900	9,000	
Total.....	35,216,593	8,818,168	50,770	42,985	316,427	150,951	

1/ Western Germany, except for 1935-39.

Source: United States Bureau of the Census.

Citrus juices.—Seven products are included here under the term "citrus juices." Of these, single-strength orange juice and single-strength grapefruit juice, in that order, were by far the most important exports in 1952 (table 8). Compared to these, blended juices were a poor third. Of the hot-pack concentrated juices, grapefruit showed a slight lead over orange; but of the frozen concentrated juices, which were shipped in very small quantities, orange was three times as important as grapefruit.

For each of these products—except hot-pack concentrated grapefruit juice—exports to Western Europe in 1952 constituted less than 25 percent of total United States exports of the product. Inasmuch as Canada is our most important export customer, a more realistic comparison is obtained if Canada is eliminated from the comparison. When that is done, Western Europe shows as our second most important customer, taking large percentages of the remaining exports: 65 percent of single-strength orange juice, 32 percent of hot-pack concentrated orange juice, 85 percent of single-strength grapefruit juice, 98 percent of hot pack concentrated grapefruit juice, and 63 percent of blended citrus juices.

Table 8.—Citrus juices: United States exports by kinds,
to countries of Western Europe, 1952

(In thousand gallons)

Country	Orange juice			Grapefruit juice			Blended juice		
	Single-strength	Hot-pack: concentrated	Frozen	Single-strength	Hot-pack: concentrated	Frozen	single-strength	Hot-pack: concentrated	Frozen
Belgium.....	220	9	1	109	1	—	—	—	19
Denmark.....	4	—	—	2	—	—	—	—	—
France.....	48	—	1/	111	—	—	—	—	31
Germany 2/.....	286	—	—	248	—	—	—	—	52
Netherlands....	284	45	2	81	7	—	—	—	1
Norway.....	1	—	—	—	—	—	—	—	—
Sweden.....	1	—	7	14	23	—	—	—	13
Switzerland....	50	10	2	39	36	2	—	—	1
United Kingdom..	10	—	1/	5	—	—	—	—	1
Total 3/.....	904	64	13	608	68	2	—	—	90
Percent of total									
U.S. exports of each product.....	13	22	2	15	94	9	—	—	2
Percent of U.S. exports ex- cluding those to Canada....	65	32	11	85	98	19	—	—	63

1/ Less than 500 gallons.

2/ Western Germany

3/ Totals may not add because of rounding.

Source: U.S. Bureau of the Census.

1. Orange juice, single-strength: Our exports of single-strength orange juice went to 51 countries in 1952 and to 37 countries in the first 9 months of 1953, indicating the wide use of this product (table 9). In Western Europe, Western Germany was our most important customer, followed by the Netherlands and Belgium. No marked seasonal pattern emerges in these exports, for the availability of foreign exchange is the most important factor in determining when purchases will be made.

2. Orange juice, hot-pack concentrated: United States exports of hot-pack concentrated orange juice, which include bottlers' bases, had a much more restricted sale than single-strength juice (table 10). Even if the quantities are reconstituted to the single-strength base, the concentrate is less important than single-strength juice. In Western Europe, the Netherlands was our best customer in 1952, followed first by Switzerland and then by Belgium.

In 1953 the United States began to ship this concentrate to the United Kingdom, for use in the health program of the Ministry of Food. These exports began with nearly 100,000 gallons in January and continued through the spring. When the total of these exports is compared with the totals for other countries, either in 1952 or in 1953, the United Kingdom's Ministry of Food is shown to be our largest single export customer for hot-pack concentrated orange juice.

3. Orange juice, frozen concentrated: For United States exports of frozen concentrated orange juice, distribution is unlike that for other orange products (table 11). Western Europe is a minor factor in our total exports, taking only 2 percent in 1952, and only 10 percent even after Canada is excluded. Attempts to market this product in Western Europe are thus far experimental.

After shipments to Canada, the largest quantities seem to have been exported to tropical posts where citizens of the United States are living, engaged either in military, petroleum, or mining activities.

4. Grapefruit juice, single-strength: Like our single-strength orange juice, our single-strength grapefruit juice is widely exported; in 1952 it was sold in 39 different countries (table 12). In Western Europe our best customers were Western Germany, followed by France, Belgium, and the Netherlands, in that order, reflecting the fact that grapefruit juice is liked in Germany but is not in particularly high favor in the Netherlands, where most purchasers prefer orange juice.

5. Grapefruit juice, hot-pack concentrated: United States exports of hot-pack concentrated grapefruit juice, which of course include bottlers' bases, are not widely distributed, going to only 8 countries in 1952 (table 13). Western Europe provides us with our most important markets; in 1952 our largest exports were made to Switzerland, Sweden, and the Netherlands, in that order.

6. Grapefruit juice, frozen concentrated: Only small quantities of frozen concentrated grapefruit juice are being exported from the United States, and these to only a few countries. In 1952 Switzerland was the only Western European country receiving any (table 14).

7. Blended citrus juices, single-strength: Although blended citrus juice is a less important United States export than either grapefruit juice or orange juice, it was shipped to as many as 29 countries in 1952 (table 15). In Western Europe, Western Germany was our most important customer, followed by Belgium and Sweden.

Table 9.—Single-strength orange juice: United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

Country	(In gallons)												Total
	January	February	March	April	May	June	July	August	September	October	November	December	
Western Europe:													
Belgium and Luxembourg	17,861	54,866	27,705	25,722	20,805	51,018	13,987	12,616	15,155	671	-	-	220,404
Denmark	-	-	1,115	1,115	700	175	369	-	-	-	400	3,872	
France	-	5,546	7,887	4,669	9,469	5,557	-	2,284	-	5,409	-	9,458	46,057
Germany 1/	-	-	31,610	11,219	4,557	96,797	22,940	-	-	-	118,500	-	285,928
Netherlands	40,543	55,564	34,620	15,670	84,503	53,175	1,350	1,013	-	-	-	-	284,235
Norway	-	338	-	-	-	-	-	-	-	-	-	544	682
Sweden	-	-	-	-	-	-	-	-	-	-	-	-	
Switzerland	1,340	6,750	10,125	8,057	2,887	675	5,358	6,750	7,612	-	-	-	933
United Kingdom	-	-	-	6,762	-	-	-	-	1,725	1,688	-	-	49,554
All others:	-	-	-	-	-	-	-	-	-	-	-	1,693	11,868
Austria	-	-	-	-	-	-	-	-	-	-	-	-	
Bahamas	495	477	591	1,555	1,322	5,024	1,200	815	60	-	1,820	2,105	15,444
Bahrain State	-	7,688	14,371	11,946	5,570	-	2,700	-	2,644	-	-	3,825	48,744
Belgian Congo	-	-	50	-	-	135	520	804	-	-	-	-	1,503
Bermuda	58	-	60	-	-	-	-	-	-	-	-	-	118
Bolivia	-	-	853	-	950	-	-	468	169	1,013	120	-	3,555
British Malaya	881	3,489	3,489	2,606	1,088	1,238	-	3,750	11,206	225	-	-	27,972
Canada	328,240	446,624	515,372	624,693	463,208	606,057	627,305	427,014	230,179	82,872	405,857	565,184	5,322,595
Colombia	-	-	1,296	-	-	-	-	-	-	-	-	-	
Cuba	-	-	875	-	-	-	-	-	252	-	-	-	1,528
Egypt	-	1,003	-	-	-	-	1,697	258	-	-	-	-	2,830
Finland	-	-	14,000	-	-	-	-	-	-	-	-	-	1,003
French Pacific Islands	-	515	-	-	-	-	130	165	-	169	-	-	14,000
French Somaliland	-	-	-	-	-	-	-	-	-	440	-	-	1,219
Guatemala	-	215	-	-	-	-	780	-	-	200	-	-	420
Hong Kong	-	-	-	669	-	-	435	675	4,917	-	-	-	1,411
India	-	-	-	-	-	-	-	-	-	-	-	-	6,696
Indochina	-	-	-	-	-	-	-	-	-	188	-	-	188
Indonesia	-	-	-	251	-	-	-	-	-	-	-	-	251
Iraq	-	-	500	-	200	188	-	-	-	-	-	-	888
Ireland	500	-	-	150	115	-	-	-	-	-	-	-	263
Italy	-	393	-	-	-	-	-	-	-	-	-	-	300
Japan	1,560	1,622	1,878	3,013	8,002	538	3,905	6,158	2,789	535	400	4,769	35,169
Kuwait	-	225	5,128	11,577	-	900	-	-	-	-	-	-	17,830
Lebanon	-	1,145	-	369	526	204	253	-	-	-	-	-	2,497
Liberia	-	507	-	-	-	-	197	405	724	-	-	-	1,653
Mexico	180	155	2,090	860	940	4,625	5,430	8,428	860	2,075	1,923	214	27,780
Mozambique	-	-	-	175	-	-	-	-	-	-	-	-	
Netherlands Antilles	-	22,179	1,988	453	6,530	3,445	1,838	4,115	7,864	1,012	593	22,412	72,227
Nigeria	-	-	-	-	-	-	-	-	-	-	-	-	175
Panama	-	-	-	-	-	-	-	-	-	856	-	-	836
Panama Canal Zone	1,762	658	1,404	280	560	-	750	-	-	-	116	-	866
Peru	-	-	175	-	-	236	168	187	177	-	381	-	1,512
Philippines	4,602	675	-	700	-	-	-	-	-	461	-	-	6,558
Portugal	355	-	-	-	-	-	-	-	-	-	-	-	355
Saudi Arabia	3,745	1,648	4,414	6,594	4,277	657	5,233	1,278	6,532	1,951	7,675	8,043	52,047
Syria	-	-	80	169	-	-	-	-	-	-	-	-	
Taiwan	-	-	-	-	-	-	-	500	-	-	-	-	249
Thailand	-	-	-	-	-	-	675	-	-	-	-	-	500
Uruguay	-	-	-	-	-	400	-	-	-	-	-	-	675
Venezuela	2,438	20,378	5,445	7,306	8,515	9,522	10,968	7,006	25,775	8,437	4,151	4,236	117,077
Total, all countries	404,158	630,870	683,363	737,555	637,205	821,921	710,524	490,155	322,451	106,239	541,993	624,752	6,714,196
1953													
Western Europe:													
Belgium and Luxembourg	50,555	71,545	17,863	32,120	26,295	45,790	7,098	-	-	3,375	-	-	234,439
Denmark	606	538	1,075	-	800	-	800	-	-	-	-	-	5,619
France	14,719	-	4,375	7,975	37,497	2,156	2,000	-	-	-	-	-	119,049
Germany 1/	-	8,439	16,229	98,506	90,375	248,294	74,466	-	3,380	-	-	-	537,590
Netherlands	5,957	6,025	14,500	30,794	57,320	47,066	-	-	1,688	1,013	1,688	31,515	197,467
Norway	-	350	-	-	369	-	-	-	-	-	-	-	719
Sweden	-	26,405	256	1,464	4,200	350	-	-	-	-	-	-	
Switzerland	-	-	3,375	338	4,669	10,944	-	-	7,790	1,125	-	-	41,590
United Kingdom	1,003	250	-	-	1,688	-	-	-	-	-	-	-	19,326
All others:	-	-	-	-	-	-	-	-	-	-	-	-	2,941
Afghanistan	-	1,087	-	-	-	-	-	-	-	-	-	-	
Arabian Peninsula	-	-	2,250	-	-	-	-	-	-	-	-	-	1,047
Austria	-	-	208	-	-	-	-	-	-	-	-	-	2,250
Bahamas	2,189	726	768	813	500	898	375	-	-	-	-	-	1,674
Bahrain State	-	20,403	20,289	10,783	1,126	112	3,240	2,700	-	1,310	-	-	2,090
Belgian Congo	-	-	-	223	255	507	-	2,020	1,350	-	5,060	-	63,713
Bermuda	-	4,557	1,634	1,006	-	750	-	-	-	-	-	-	4,351
Bolivia	-	-	-	501	135	405	-	-	-	-	-	-	6,132
British Malaya	-	911	169	-	-	-	2,301	-	-	-	-	-	1,041
Canada	384,194	447,530	560,590	380,929	376,844	453,518	644,745	366,360	218,278	289,306	594,385	582,892	5,295,71
Cuba	569	538	418	-	-	75	-	-	2,042	-	620	-	4,063
Egypt	-	-	-	-	-	-	-	-	-	1,690	-	-	1,90
French Pacific Islands	352	270	-	330	-	288	-	-	-	-	-	-	1,240
French Somaliland	-	-	-	865	-	-	-	-	-	-	-	-	2,155
French West Africa	140	-	-	-	-	-	-	-	-	1,290	-	-	140
Gibraltar	-	237	-	-	-	-	-	-	-	-	-	-	237
Hong Kong	-	-	338	-	538	-	-	4,647	-	878	-	-	6,201
Indonesia	432	-	-	-	500	-	-	-	-	-	1,350	-	2,282
Italy	-	-	538	1,561	-	-	-	-	-	-	-	-	1,599
Jamaica	-	203	-	223	-	-	-	-	-	-	-	-	426
Japan	1,805	655	6,755	4,440	19,995	19,254	11,469	3,227	675	11,171	5,375	9,920	92,719
Kuwait	4,590	3,590	1,238	6,220	9,878	1,973	3,375	450	-	-	-	-	31,44
Lebanon	188	-	1,884	555	169	-	750	-	-	-	-	-	3,576
Liberia	-	225	-	116	419	-	1,181	-	4,990	-	-	-	760
Mexico	840	580	240	540	939	1,214	4,090	4,000	-	2,000	4,000	700	1,945
Netherlands Antilles	-	8,485	5,674	6,425	253	1,410	6,580	4,575	6,500	-	16,540	208	59,550
Panama	-	-	375	-	155	-	-	1,025	-	-	-	-	1,535
Panama Canal Zone	2,666	197	1,280	2,085	2,243	-	1,800	3,687	90	922	675	1,958	17,603
Philippines	-	-	1,286	416	2,426	-	1,181	-	-	-	-	-	3,065
Portugal	-	-	-	-	-	103	-	-	-	-	-	-	103
Saudi Arabia	243	6,240	11,343	19,244	375	902	16,200	2,150	6,202	-	-	-	62,899
Thailand	150	-	-	203	-	-	-	-	860	-	-	-	1,213
Venezuela	3,724	5,719	4,555	4,449	200	-	6,379	1,365	1,350	-	2,825	-	30,446
Total, all countries	454,520	616,011	680,658	610,607	639,937	834,125	787,593	396,206	255,625	323,101	679,686	641,581	6,714,196

1/ Western Germany.

Sources: Compiled from records of the U.S. Bureau of the Census.

Table 10.--Hot-pack concentrated orange juice:^{1/} United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

Country	(In gallons)												Total
	January	February	March	April	May	June	July	August	September	October	November	December	
1952													
Western Europe:	:	:	:	:	:	:	:	:	:	:	:	:	:
Belgium and Luxembourg	-	1,125	50	50	100	224	724	200	6,410	-	-	-	8,883
Netherlands	4,140	-	12,734	5,268	1,020	7,500	8,190	703	5,630	-	-	-	45,185
Switzerland	-	-	4,160	420	2,400	-	900	2,400	-	-	-	-	10,280
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Bermuda	355	-	56	-	-	318	112	75	98	-	56	71	1,141
British Malaya	394	-	6,750	4,551	-	828	300	13,710	13,080	6,000	6,200	6,000	57,913
Canada	13,952	966	5,918	2,371	24,270	3,483	12,924	20,534	5,866	806	546	637	92,075
Cuba	-	840	2,640	3,200	1,600	2,800	4,200	2,800	-	-	-	-	23,680
Hong Kong	-	-	-	-	-	-	1,500	-	600	-	-	-	2,100
Japan	512	-	-	-	-	-	-	-	-	79	-	60	651
Liberia	-	-	-	-	-	60	-	-	-	-	22	-	82
Mexico	-	-	50	-	412	350	150	250	196	100	100	96	1,704
Panama	-	-	-	-	-	-	-	72	-	-	-	-	72
Peru	-	-	-	-	-	-	-	-	-	-	-	327	327
Philippines	-	-	1,575	1,752	900	1,803	2,780	1,008	-	-	-	-	2,813
Saudi Arabia	-	-	-	-	-	-	102	-	-	45	-	-	147
Syria	-	-	-	-	-	-	-	113	-	-	-	-	113
Thailand	-	600	935	374	-	-	-	-	-	-	-	1,200	3,109
Uruguay	-	-	-	-	-	-	-	-	-	-	66	-	66
Venezuela	1,796	1,213	1,775	2,772	857	6,900	2,460	3,462	2,425	4,353	1,980	1,588	31,583
Total all countries	21,151	4,744	36,643	20,758	31,559	24,266	32,942	46,727	37,105	14,1P3	8,872	12,792	291,742
1953													
Western Europe:	:	:	:	:	:	:	:	:	:	:	:	:	:
Belgium and Luxembourg	-	100	-	-	-	-	-	-	3,010	1,674	-	-	4,784
Denmark	-	-	-	690	-	-	-	-	-	-	-	-	690
Germany ^{2/}	-	-	-	-	12,000	-	6,000	6,000	-	12,000	-	-	36,000
Netherlands	600	8,178	8,882	5,820	9,228	14,700	5,970	2,604	15,642	720	-	5,770	78,114
Sweden	-	-	-	-	-	-	-	2,400	264	-	-	-	2,664
Switzerland	-	-	2,600	-	1,000	240	1,800	-	-	900	-	300	6,040
United Kingdom	99,914	-	13,728	31,524	29,700	24,000	-	-	-	-	-	-	198,866
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Bahamas	50	-	-	-	-	-	-	-	-	-	-	-	50
Belgian Congo	-	-	-	-	-	34	-	-	-	-	-	-	34
British Malaya	-	-	-	600	660	1,200	13,845	12,000	3,600	600	-	3,180	35,685
Canada	7,319	5,689	8,737	15,100	36,065	18,780	21,698	10,614	10,673	3,225	300	2,600	140,800
Cuba	1,400	1,400	2,000	-	-	-	-	-	-	678	-	-	5,478
Guatemala	-	-	36	-	-	28	-	-	-	-	-	-	64
Hong Kong	-	-	-	600	300	1,200	-	-	-	-	-	-	2,100
Iceland	-	-	-	-	72	174	-	-	-	-	-	-	246
Japan	-	-	-	-	-	34	-	-	-	-	-	-	34
Kuwait	-	-	-	-	38	-	-	-	-	-	-	-	38
Mexico	-	342	200	252	1,500	-	192	-	288	192	-	-	2,966
Peru	-	-	56	-	-	-	-	-	-	-	-	900	956
Netherlands Antilles	-	168	-	-	-	-	-	-	-	-	-	-	168
Philippines	-	-	-	-	-	-	698	-	-	-	-	-	698
Saudi Arabia	-	-	-	-	200	-	-	-	-	-	-	-	200
Venezuela	-	1,005	2,598	1,225	2,411	149	904	675	195	210	-	3,457	1701
Total, all countries	110,288	21,075	35,464	58,295	90,488	74,665	47,233	25,418	31,587	18,489	6,937	9,740	529,674

^{1/} Includes bottlers' bases.^{2/} Western Germany.

Source: U.S. Bureau of the Census.

Table 11.--Frozen concentrated orange juice: United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

Country	(In gallons)												Total
	January	February	March	April	May	June	July	August	September	October	November	December	
Western Europe:													
Belgium and Luxembourg....	-	-	-	-	-	-	-	-	-	-	-	-	1,207
France.....	-	-	-	-	-	-	-	-	-	-	-	-	110
Netherlands.....	-	-	-	-	-	1,998	-	-	-	-	-	-	280
Sweden.....	-	-	-	-	-	-	-	-	-	-	-	-	6,945
Switzerland.....	-	-	-	-	1,258	65	-	-	775	-	-	-	5,575
United Kingdom.....	-	-	-	-	75	-	-	-	-	45	-	-	2,176
All others:	-	-	-	-	-	-	-	-	-	-	-	-	100
Bahamas.....	56	83	279	170	-	90	260	-	90	155	111	600	1,854
Bermuda.....	53	254	281	752	990	636	1,587	1,358	567	1,277	513	608	8,641
British Malaya.....	-	565	191	-	-	225	-	225	-	-	-	-	1,194
Canada.....	56,186	29,568	90,212	34,056	22,668	47,784	64,477	35,260	119,267	48,317	47,102	62,202	657,099
Colombia.....	-	-	-	-	-	-	-	-	-	-	-	-	517
Cuba.....	-	-	-	-	-	-	-	-	90	2,104	69	-	2,263
Dominican Republic.....	-	-	-	-	-	-	-	-	60	-	-	-	60
French West Africa.....	-	-	-	-	-	-	-	-	60	-	-	-	60
Honduras.....	-	-	-	12	-	-	-	-	-	-	-	-	12
Hong Kong.....	-	-	-	-	-	-	-	-	575	1,425	1,725	850	974
Iceland.....	-	-	100	-	-	-	-	-	-	-	-	-	100
Ireland.....	-	-	-	-	-	-	-	-	70	-	-	200	270
Japan.....	-	-	-	-	-	-	-	-	33	-	41	-	74
Kuwait.....	-	-	-	30	-	-	-	-	-	-	-	27	57
Lebanon.....	-	-	-	-	-	-	-	-	48	-	-	-	48
Liberia.....	-	-	65	-	-	-	-	-	-	-	-	-	65
Netherlands Antilles.....	-	-	55	715	527	268	854	957	833	77	401	526	4,975
Pakistan.....	-	-	-	-	-	-	-	-	-	-	-	-	115
Panama.....	200	176	210	402	523	674	751	263	263	-	-	-	1,600
Panama Canal Zone.....	450	225	281	562	622	585	868	926	868	1,709	1,125	1,874	10,095
Philippines.....	-	-	-	-	-	25	-	-	40	-	-	-	65
Saudi Arabia.....	1,258	128	1,484	1,156	-	2,559	-	3,487	5,821	-	-	5,041	397
South Africa.....	-	-	-	-	-	-	-	45	-	-	56	-	101
Venezuela.....	1,651	2,159	2,158	2,974	5,661	4,996	3,945	4,041	16,404	2,086	502	1,245	47,782
West Pacific Islands.....	-	-	-	45	-	82	-	-	-	-	-	-	127
Total, all countries....	59,794	33,116	95,308	42,145	53,156	59,157	72,542	47,948	145,850	58,861	56,021	76,066	779,924
Western Europe:													
Belgium and Luxembourg....	-	450	-	-	-	-	400	1,475	-	-	200	-	400
France.....	-	-	-	-	-	-	-	-	440	-	-	440	-
Germany 1/.....	-	515	-	-	-	5,920	-	2,647	-	-	1,000	6,450	14,532
Netherlands.....	-	-	-	-	2,250	-	-	-	-	-	-	-	2,250
Norway.....	-	-	-	-	156	-	-	-	-	-	-	-	156
Sweden.....	-	-	2,250	-	-	11,250	-	-	-	-	-	-	13,500
Switzerland.....	-	-	-	-	3,150	5,150	5,495	1,687	-	-	-	6,750	18,232
United Kingdom.....	75,006	-	90	-	-	-	-	-	-	-	-	-	75,096
All others:	-	-	-	-	-	-	-	-	-	-	-	-	-
Bahamas.....	60	64	848	118	65	130	-	-	-	-	-	-	785
Bermuda.....	585	835	572	957	1,612	690	1,550	1,401	-	1,312	985	800	11,097
British Malaya.....	-	-	-	-	-	150	-	248	450	248	600	-	1,596
Canada.....	55,286	99,532	87,675	95,815	136,511	108,511	124,156	126,698	73,750	69,130	93,227	46,239	1,116,528
Cuba.....	-	415	-	-	265	60	-	-	-	-	150	-	886
Dominican Republic.....	-	-	-	-	60	-	-	-	-	-	-	-	60
French West Africa.....	90	-	-	-	-	-	-	-	-	-	-	-	90
Ireland.....	-	-	-	70	-	158	-	-	-	-	-	-	208
Liberia.....	-	45	-	-	72	-	-	-	-	-	-	-	117
Mexico.....	-	-	-	-	50	-	-	-	-	-	-	-	50
Netherlands Antilles.....	229	744	365	371	328	870	182	418	1,212	1,158	650	501	6,807
Panama.....	1,515	438	480	-	1,835	-	400	1,250	190	-	540	385	6,633
Panama Canal Zone.....	1,648	460	824	467	674	674	467	1,200	300	1,302	1,987	10,005	-
Peru.....	-	102	-	192	167	167	-	-	-	-	150	-	778
Philippines.....	-	135	722	-	263	-	-	-	-	-	-	-	1,120
Saudi Arabia.....	-	866	-	556	7,878	2,539	4,486	1,914	-	1,187	936	-	20,362
Taiwan.....	-	-	-	-	-	-	-	-	-	1,950	-	-	1,950
Venezuela.....	2,020	1,815	1,826	2,209	5,025	2,365	5,254	4,690	2,645	3,115	1,963	2,365	51,282
West Pacific Islands.....	-	-	-	-	-	-	-	41	-	-	-	-	41
Total, all countries....	136,037	108,664	92,972	106,584	171,158	119,641	140,006	137,726	81,194	78,132	113,193	52,477	1,337,964

1/ Western Germany.

Source: U.S. Bureau of the Census.

Table 12.--Single-strength grapefruit juice: United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

Country	(In gallons)												Total
	January	February	March	April	May	June	July	August	September	October	November	December	
	1952												
Western Europe:													
Belgium and Luxemburg....	-	-	2,742:	8,499:	21,390:	18,713:	17,869:	24,839:	7,409:	7,055:	-	-	-
Denmark.....	-	-	-	578:	-	-	-	-	395:	-	-	-	906: 1,882
France.....	4,312:	-	17,606:	2,937:	43,229:	11,455:	13,854:	12,560:	1,360:	-	-	-	4,125: 111,438
Germany 1/.....	-	-	-	-	3,068:	12,551:	151,812:	32,063:	-	-	-	-	247,895
Netherlands.....	-	-	1,225:	6,813:	18,350:	25,063:	3,375:	16,000:	10,125:	-	-	-	80,951
Sweden.....	-	-	-	-	-	-	-	-	5,938:	1,616:	1,013:	-	14,067
Switzerland.....	337:	-	8,437:	15,779:	2,420:	7,585:	506:	-	5,449:	-	-	-	38,511
United Kingdom.....	-	-	-	-	2,000:	-	-	1,725:	-	-	-	-	843: 4,568
All others:													
Austria.....	-	-	-	-	-	808:	-	1,876:	-	-	-	-	433: 3,117
Bahamas.....	-	-	523:	-	-	-	-	-	-	-	-	-	523
Bahrain State.....	-	-	563:	1,912:	-	-	-	-	-	-	-	-	2,024: 3,599
Belgian Congo.....	-	-	-	-	-	135:	-	473:	-	-	-	-	608
Bolivia.....	-	-	-	571:	877:	-	-	468:	-	1,098:	-	-	222: 4,188
British Malaya.....	-	-	-	-	237:	-	592:	-	3,180:	7,223:	-	-	-
Canada.....	197,077:	254,985:	330,891:	332,017:	344,981:	409,932:	476,241:	348,400:	165,229:	133,927:	216,279:	256,687:	3,466,644
Ceylon.....	68:	-	-	-	-	-	-	-	-	-	-	-	68
Colombia.....	-	-	-	-	-	-	-	-	-	152:	-	-	150: 282
Cuba.....	-	-	150:	338:	304:	-	175:	460:	-	1,414:	506:	-	3,347
Dominican Republic.....	-	-	-	-	-	-	-	-	113:	-	-	-	113
French Somaliland.....	154:	-	-	-	-	-	-	900:	-	-	-	-	1,054
Hong Kong.....	-	-	-	-	562:	-	-	378:	357:	-	200:	-	1,497
Indochina.....	-	-	-	251:	-	-	-	-	-	-	-	-	251
Indonesia.....	-	-	400:	-	150:	-	-	-	-	-	-	-	550
Ireland.....	300:	-	-	-	-	-	-	-	-	-	-	-	500
Italy.....	-	1,150:	-	-	-	-	1,358:	1,070:	200:	-	375:	-	4,153
Japan.....	-	-	-	1,177:	-	270:	776:	418:	163:	-	369:	-	3,179
Kuwait.....	-	-	-	-	175:	-	-	-	-	-	-	-	175
Lebanon.....	473:	-	1,201:	-	-	188:	-	150:	-	-	-	-	2,012
Liberia.....	-	-	-	-	-	-	-	-	185:	-	-	-	185
Mexico.....	-	1,293:	740:	785:	324:	1,050:	3,745:	3,699:	1,745:	1,289:	1,120:	225:	16,015
Netherlands Antilles....	647:	1,521:	-	-	-	-	-	250:	1,336:	375:	-	335:	4,267
Panama.....	-	173:	-	169:	-	169:	570:	627:	-	459:	1,288:	-	3,435
Panama Canal Zone.....	56:	1,649:	-	480:	347:	450:	-	1,250:	2,316:	1,803:	824:	-	9,175
Peru.....	-	-	-	-	-	258:	-	-	300:	-	224:	-	999
Philippines.....	400:	-	-	-	-	-	-	-	-	-	-	-	400
Saudi Arabia.....	-	-	-	5,750:	1,310:	1,270:	113:	3,340:	2,669:	854:	854:	-	16,160
Taiwan.....	-	-	-	-	-	-	-	250:	-	-	-	-	250
Uruguay.....	-	-	-	-	-	-	-	-	216:	-	-	-	216
Venezuela.....	175:	1,114:	280:	1,219:	1,041:	202:	693:	361:	6,858:	213:	602:	510:	13,268
Total, all countries....	203,999:	284,988:	372,113:	393,362:	448,142:	528,299:	560,812:	403,118:	214,973:	143,028:	272,154:	274,170:	4,179,158
							1555:						
Western Europe:													
Belgium and Luxemburg....	16,293:	64,817:	58,311:	13,252:	11,888:	16,811:	5,073:	13,238:	12,937:	-	-	-	212,620
Denmark.....	506:	338:	638:	-	400:	-	684:	-	-	-	-	-	2,566
France.....	26,104:	47,376:	38,225:	7,535:	25,885:	14,352:	6,315:	-	-	-	106,941:	-	272,709
Germany 1/.....	-	5,064:	6,589:	25,650:	80,291:	241,820:	27,069:	-	-	-	-	-	386,485
Netherlands.....	844:	350:	12,982:	20,250:	33,412:	9,957:	34,764:	-	-	-	-	-	5,068: 117,627
Sweden.....	-	19,583:	266:	1,214:	2,313:	1,013:	-	-	-	-	-	-	24,076: 48,465
Switzerland.....	-	-	4,875:	338:	2,119:	7,225:	-	-	-	-	-	-	14,557
United Kingdom.....	-	1,003:	-	-	5,188:	-	-	-	-	-	-	-	6,191
All others:													
Arabian Peninsula.....	-	-	1,125:	-	-	-	-	-	-	-	-	-	1,125
Austria.....	-	433:	-	-	-	-	1,750:	-	-	-	-	-	2,185
Bahamas.....	553:	285:	-	253:	-	-	-	-	-	-	-	-	1,091
Bahrain State.....	1,012:	169:	-	-	-	-	-	-	-	-	-	-	1,181
Belgian Congo.....	-	-	-	-	-	-	338:	-	1,630:	-	-	-	2,028
Bermuda.....	-	2,952:	511:	588:	-	-	2,160:	1,296:	-	-	-	-	7,507
Bolivia.....	-	198:	-	-	-	-	-	-	-	-	-	-	198
British Malaya.....	-	-	-	-	-	-	-	2,772:	-	-	-	-	2,772
Canada.....	251,136:	327,972:	317,533:	199,864:	260,875:	304,664:	481,717:	242,410:	135,478:	131,677:	259,647:	266,410:	5,181,588
Colombia.....	-	-	-	-	-	105:	-	-	-	-	-	-	105
Cuba.....	-	935:	400:	-	738:	-	-	5,993:	-	-	-	-	8,066
Egypt.....	-	-	-	-	-	-	-	-	-	-	-	-	1,690: 1,690
French Somaliland.....	-	-	-	-	960:	-	-	-	-	-	-	-	960
Hong Kong.....	338:	-	1,422:	247:	506:	675:	-	-	-	-	-	-	3,248
Indochina.....	-	-	-	-	99:	-	-	-	-	-	-	-	98
Indonesia.....	311:	-	-	-	-	200:	-	-	-	-	-	-	511
Italy.....	-	-	193:	1,398:	866:	1,075:	-	-	-	-	-	-	3,927
Japan.....	-	-	-	-	4,541:	700:	-	-	-	-	-	-	5,241
Lebanon.....	-	-	253:	203:	-	-	-	-	-	-	-	-	456
Liberia.....	-	-	-	-	-	120:	-	-	-	-	-	-	120
Mexico.....	150:	150:	586:	1,800:	2,250:	1,071:	-	800:	480:	7,930:	7,410:	1,200:	23,827
Netherlands Antilles....	-	462:	2,093:	216:	-	741:	279:	-	-	-	-	-	5,798
Panama.....	-	-	582:	548:	795:	1,513:	-	-	-	3,850:	-	-	7,288
Panama Canal Zone....	2,200:	-	1,138:	1,750:	1,760:	-	-	3,780:	1,310:	2,278:	800:	1,642:	16,648
Peru.....	-	675:	-	-	554:	188:	-	-	-	-	-	-	1,217
Philippines.....	-	-	-	-	-	523:	-	-	-	-	-	-	323
Saudi Arabia.....	212:	-	1,444:	10,261:	-	199:	3,436:	-	-	-	-	-	15,552
Syria.....	-	720:	-	-	-	-	-	-	-	1:	-	-	720
Venezuela.....	240:	-	-	105:	-	-	-	-	-	-	1,175:	-	1,520
Total, all countries....	299,899:	473,459:	449,221:	286,530:	434,672:	602,567:	566,017:	263,207:	150,205:	145,735:	375,973:	302,086:	4,355,501

1/ Western Germany.

Source: Compiled from records of the U.S. Bureau of the Census.

Table 13.--Hot-pack concentrated grapefruit juice:^{1/} United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

(In gallons)

Country	January	February	March	April	May	June	July	August	September	October	November	December	Total
1952													
Western Europe:	:	:	:	:	:	:	:	:	:	:	:	:	:
Belgium and Luxembourg	-	-	-	-	-	-	-	1,080	-	-	-	-	1,080
Netherlands	-	-	-	-	4,200	-	900	-	900	1,008	-	-	7,008
Sweden	-	-	-	-	-	-	-	21,730	-	1,662	-	-	23,392
Switzerland	-	-	-	3,505	4,611	4,200	450	-	18,000	522	-	-	56,288
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Canada	-	-	-	-	-	90	60	-	1,125	1,800	-	-	3,075
Hong Kong	-	-	-	-	-	-	-	-	-	60	-	-	60
Mexico	-	-	-	-	-	-	-	-	-	360	-	-	360
Venezuela	795	-	-	-	-	-	-	-	-	56	-	-	351
Total, all countries	795	-	3,505	8,811	4,290	1,410	-	42,835	3,806	1,662	-	-	5,360
1953													
Western Europe:	:	:	:	:	:	:	:	:	:	:	:	:	:
Belgium and Luxembourg	-	-	-	-	420	-	-	-	-	-	-	-	420
Netherlands	6,533	-	215	790	327	-	2,250	-	-	-	-	-	10,115
Sweden	-	-	-	-	420	-	-	-	-	-	-	-	420
Switzerland	1,090	5,000	1,110	5,198	102	-	-	18,000	-	-	-	-	30,490
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Canada	-	-	-	-	531	900	-	-	-	-	-	-	1,451
Mexico	-	360	-	-	300	360	-	-	360	360	-	-	1,740
Netherlands Antilles	-	60	-	-	-	-	3,000	-	-	-	-	-	3,060
Total, all countries	7,813	5,420	1,325	6,408	1,680	1,260	2,250	3,000	18,360	360	-	-	47,676

^{1/} Includes bottlers' bases.

Source: Compiled from Bureau of the Census records.

Table 14.--Frozen concentrated grapefruit juice: United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

(In gallons)

Country	January	February	March	April	May	June	July	August	September	October	November	December	Total
1953													
Western Europe:	:	:	:	:	:	:	:	:	:	:	:	:	:
Switzerland	-	-	-	-	1,704	-	-	-	-	-	-	-	1,704
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Canada	-	450	169	731	3,318	337	1,126	1,968	-	788	224	731	9,842
Bermuda	-	-	-	-	-	163	-	-	-	-	-	-	163
Panama	-	-	-	-	-	-	207	-	-	58	-	-	265
Panama Canal Zone	56	-	-	-	-	-	56	-	-	-	-	-	56
Venezuela	-	587	1,246	2,315	1,711	321	-	57	350	-	50	120	6,757
Total, all countries	56	1,037	1,415	4,750	5,192	714	1,333	2,025	350	846	274	907	18,899
1952													
All others:	:	:	:	:	:	:	:	:	:	:	:	:	:
Bahamas	-	-	-	-	-	26	-	-	-	-	-	-	26
Canada	896	1,050	2,692	901	675	3,947	2,307	1,688	4,331	281	6,075	3,374	28,217
Mexico	-	-	-	-	-	415	-	-	-	-	-	-	415
Panama	100	-	-	-	-	-	-	-	-	-	-	-	100
Panama Canal Zone	112	56	-	-	-	56	-	-	-	560	75	-	859
Venezuela	114	-	-	240	-	900	-	-	-	-	-	-	1,254
Total, all countries	1,222	1,106	2,692	1,141	1,080	4,929	2,307	1,688	4,331	841	6,150	3,374	30,871

Source: Compiled from records of the Bureau of Census.

Table 15.--Blended citrus juices: United States monthly exports to countries of Western Europe and to all others, 1952 and 1953

Country	January	February	March	April	May	June	July	August	September	October	November	December	(In gallons)		
													1952	1953	
Western Europe:															
Belgium and Luxemburg....	-	-	780:	-	4,953:	7,711:	1,466:	-	-	2,190:	1,941:	-	-	19,041	
France.....	-	-	-	-	-	-	-	1,399:	-	-	-	-	-	3,015	
Germany 1/.....	-	-	-	-	-	2,700:	28,500:	10,126:	-	-	-	-	10,800:	51,826	
Netherlands.....	-	-	-	350:	676:	-	-	-	-	-	-	-	-	1,026	
Sweden.....	-	-	-	-	-	575:	-	-	4,125:	-	1,350:	7,500:	12,975		
Switzerland.....	-	-	-	-	-	-	-	-	357:	-	-	-	-	1,012	
United Kingdom.....	-	-	-	-	-	-	-	675:	-	-	-	-	675:	1,350	
All others:	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Austria.....	-	-	-	-	-	375:	-	-	-	-	-	-	-	375	
Bahamas.....	-	-	-	-	-	300:	-	-	-	-	-	-	-	300	
Bermuda.....	-	-	400:	55:	588:	379:	590:	265:	3,080:	419:	-	-	-	5,754	
Bolivia.....	-	-	-	203:	186:	-	-	-	-	-	506:	-	-	222:	
Canada.....	362,298:	321,229:	378,281:	333,477:	323,736:	360,239:	473,280:	319,668:	164,835:	128,454:	233,698:	282,419:	3,681,594		
Cuba.....	130:	-	-	-	-	-	-	-	-	-	37:	-	-	167	
Iraq.....	-	-	150:	-	-	345:	-	150:	-	-	-	-	-	645	
Ireland.....	600:	-	-	-	-	-	-	-	-	-	-	-	-	600	
Italy.....	-	-	187:	-	-	-	44:	400:	360:	-	-	-	-	991	
Japan.....	-	-	-	249:	246:	-	-	1,141:	417:	-	172:	-	-	2,225	
Kuwait.....	-	-	-	-	-	200:	-	-	-	-	-	-	-	200	
Lebanon.....	-	-	925:	240:	-	214:	-	-	66:	-	-	-	-	1,443	
Liberia.....	-	-	168:	-	-	-	-	-	2,070:	180:	-	-	-	2,568	
Mexico.....	200:	-	-	-	-	2,800:	550:	502:	-	-	298:	275:	-	4,625	
Netherlands Antilles.....	-	-	4,200:	-	358:	2,576:	2,020:	-	301:	-	-	-	-	9,761	
Panama.....	-	-	S21:	-	-	-	-	-	-	-	-	-	-	521	
Panama Canal Zone.....	-	-	-	-	720:	936:	-	-	206:	-	-	1,175:	685:	3,702	
Peru.....	-	-	-	-	-	-	168:	-	-	-	-	-	-	188	
Saudi Arabia.....	1,332:	486:	-	-	-	536:	-	113:	-	-	-	-	-	2,467	
Taiwan.....	-	-	-	-	-	-	-	-	1,440:	-	-	-	-	1,440	
Uruguay.....	-	-	-	-	-	-	-	113:	-	-	-	-	-	113	
Venezuela.....	488:	5,776:	151:	615:	-	1,658:	1,199:	57:	1,509:	240:	SO:	759:	12,500		
Total, all countries.....	365,048:	334,820:	379,507:	344,597:	341,535:	395,192:	488,053:	328,453:	175,593:	131,545:	246,773:	294,225:	3,923,519		
1953															
Western Europe:															
Belgium and Luxemburg....	3,057:	3,226:	575:	6,376:	3,375:	4,050:	-	-	-	-	-	-	-	20,639	
France.....	269:	-	-	-	-	255:	-	-	-	-	-	-	-	S24	
Germany 1/.....	-	S,401:	4,886:	11,482:	27,675:	49,228:	22,625:	1,350:	-	-	-	-	-	122,519	
Netherlands.....	-	-	350:	1,015:	-	10,125:	17,105:	-	-	-	-	-	-	844:	
Sweden.....	7,500:	10,470:	505:	-	1,400:	216:	-	1,299:	-	-	-	-	-	4,258:	
Switzerland.....	-	-	-	-	358:	675:	337:	-	-	-	-	-	-	1,350	
United Kingdom.....	1,003:	-	-	-	1,688:	-	-	-	-	-	-	-	-	2,691	
All others:	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Bahamas.....	-	-	-	-	45:	102:	-	-	-	-	-	-	-	147	
Bermuda.....	-	-	2,253:	441:	169:	200:	-	-	-	-	-	-	4,310:	7,373	
Canada.....	261,413:	324,077:	344,S06:	219,579:	269,658:	304,633:	385,470:	132,801:	61,429:	175,403:	402,501:	241,702:	3,125,272		
Cuba.....	-	-	-	-	-	-	-	-	-	-	-	1,072:	-	1,072	
French Somaliland.....	-	-	-	-	390:	-	154:	-	-	-	-	-	-	544	
Hong Kong.....	-	-	-	-	358:	-	169:	-	-	-	-	-	-	507	
Italy.....	-	-	-	-	-	-	338:	-	-	-	-	-	-	338	
Japan.....	-	-	-	-	-	664:	-	4,100:	-	-	-	-	-	4,764	
Kuwait.....	-	180:	-	-	-	-	-	-	-	-	-	-	-	180	
Liberia.....	-	-	-	-	-	111:	120:	-	-	-	-	-	-	231	
Netherlands Antilles.....	-	-	1,013:	-	-	-	2,150:	-	800:	-	1,086:	-	-	S,049	
Panama Canal Zone.....	840:	-	-	-	-	-	-	-	141:	-	-	421:	-	1,402	
Saudi Arabia.....	-	-	-	-	-	298:	-	-	-	-	-	-	-	298	
Venezuela.....	841:	495:	394:	1,604:	1,580:	661:	-	-	-	-	-	-	338:	-	6,013
Total, all countries.....	274,903:	346,452:	353,105:	242,009:	315,920:	377,309:	414,345:	135,450:	62,370:	175,403:	405,097:	251,515:	3,353,878		

1/ Western Germany.

Source: U.S. Bureau of the Census.

Belgium

The year 1953 was a good one for citrus importers in Belgium, and the strong market indicates that the demand for citrus is still increasing in that country. There is a fairly close correlation between the index of industrial-production in Belgium and total orange imports (table 16). In 1950 and 1951, when industrial production increased, imports increased; and in 1952, when production declined, imports did the same. The relatively strong Belgium reserve position is reflected in continued imports of citrus from the United States (actual imports of United States oranges into Belgium are probably greater than the figure for United States exports in table 16 shows, for the exports do not account for such fruit as may have been bought through a third country, such as the Netherlands).

Table 16.--Industrial-production index and gold and dollar holdings in Belgium compared with that country's total imports of oranges and with United States exports of oranges to Belgium
1938 and 1948-53:

Year	Industrial production index (1948=100)	Gold and dollar holdings, December Million dollars	Total orange imports 1,000 boxes	U. S. exports of oranges 1/ 1,000 boxes
1938.....	82	828	2,117	2/ 101
1948.....	100	838	3,128	3/ 699
1949.....	100	913	2,677	
1950.....	102	840	3,007	693
1951.....	117	898	3,669	806
1952.....	114	1,036	3,369	671
1953.....	4/	5/ 1,042	4/	4/

1/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51 etc.

2/ 1935-39 average.

3/ 1945-49 average.

4/ Not available.

5/ As of June.

Source: Index and holdings, Mutual Security Program, Reports to Congress; imports, official Belgian sources; exports, U.S. Bureau of the Census.

Belgium has recently increased its import duties on citrus fruit. On oranges, for instance, the duty for years had been 13 percent ad valorem; but on July 1, 1953, it was increased to 15 percent and on November 1, 1953, to 20 percent, to remain at that level until March 1, 1954, when it will return to 15 percent. Although the new rates apply to fruit from all sources, they are an unfavorable factor in that they will tend to increase the costs of citrus fruit and eventually the retail prices, making citrus less competitive with domestic fruit.

United States advertising of fresh citrus fruit is now more apparent in Belgium than it was before. Some retail shops were observed to be using point-of-sale posters at their fruit stands. Some retailers expressed the opinion that small cards about 10 inches by 12 inches made the most useful posters since they could be used at the fruit bin. Trade sources indicated that newspaper advertising had improved and was helpful.

In 1953 some direct importers of citrus fruit in Belgium began to give the four members of the Antwerp auction some competition. For example, in August a ship brought 19,500 boxes of oranges to Antwerp; 16,000 boxes belonged to the auction members; the rest were imported directly, many through Dutch brokers, by former auction customers. Distribution of the cargo was approximately as follows:

	<u>Number of boxes</u>
Auction members:	
No. 1 and 2	11,500
No. 3	3,000
No. 4	1,500
Direct importers:	
A	1,000
B	500
C	500
D	500
E	500
F	500

Thus some of the direct importers handled almost as much fruit as some of the auction members. This competition will be interesting to observe. It is healthy competition but may tend to weaken somewhat the ability of the auctions to establish a market in which trading can be carried on without the uncertainties that arise when competing sources have the same article available in unknown volume and at different prices.

Market for California Fruit

In August, California citrus dominated the Belgian market. California oranges, lemons, and grapefruit were for sale everywhere. Extremely high prices can be obtained for fruit in Belgium; but California citrus, compared with most other fruit, sells at prices that are relatively reasonable (table 17).

Oranges.—The summer market for California Valencia oranges was strong in Belgium in 1953; prices paid on the Antwerp auctions were high (table 18), averaging more than \$6 per box and more than making up for losses suffered on California Navel early in the year and on California Valencia later, in August. These prices are evidence of the strong demand for oranges and are remarkable considering that during this time, April through July, Belgium imported nearly half a million boxes of United States oranges. The high Continental price for South African oranges—36 to 37 shillings, or \$5.04 to \$5.18, per box—kept that fruit off the market.

In the winter market, California oranges do not bring premium prices in Europe, a fact that is a handicap to our export markets. A comparison of Antwerp auction prices on two different dates for California oranges and for high-quality Mediterranean oranges shows that, with one exception, the Mediterranean oranges commanded the highest prices (table 19). This handicap, which hinges upon comparative quality, limits our exports even more than the large volume of Mediterranean citrus available in the winter season. This is an important fact to consider; for, if our winter oranges brought premium prices, our industry would be able to pay the high freight rates and yet compete successfully in Europe's winter market.

Table 17.—Retail prices for fruits and vegetables in Belgium, August 1953

Items	In Belgian francs:		In U. S. cents
	per kilo	per pound	
<u>California citrus:</u>			
Oranges (Valencia):	12-16	:	11-15
Grapefruit:	13-16	:	12-15
Lemons:	20-22	:	18-20
Peaches:	18-30	:	16-27
Apples:	6-16	:	5-15
Bananas:	17.50-22.00	:	16-20
<u>Grapes:</u>			
Fancy white:	100	:	91
Fancy dark:	60	:	55
Plums:	8-11	:	7-10
Pears (small):	5	:	5
Potatoes:	1.70-2.50	:	2-3
Tomatoes:	9-24	:	8-22

Source: Author's observations in retail markets.

Table 18.—Prices for California Valencia oranges,
size-344 box, on the Antwerp auctions on
specified days, April-July 1953

Day	In Belgian francs		In U.S. dollars	
	High	Low	High	Low
April 26.....	293	1/	5.88	1/
May 5.....	290	289	5.82	5.80
May 10.....	282	277	5.66	5.56
May 26.....	372	368	7.46	7.38
June 2.....	382	380	7.66	7.62
June 9.....	435	400	8.72	8.02
June 16.....	341	340	6.84	6.82
June 23.....	247	243	4.95	4.87
June 30.....	297	295	5.96	5.92
July 15.....	310	307	6.22	6.16
July 23.....	312	308	6.26	6.18

1/ Only one sale was made.

Source: Priced catalogs of B.W. Spiers, Leon Van Parys, and Gerard Koninckx, Freres, Antwerp.

Table 19.—Prices for high quality Mediterranean oranges and for California oranges on the Antwerp auctions, February 12 and April 14, 1953

Source and variety	Size : of : box :	Price	
		February 12	April 14
		U.S. dollars	U.S. dollars
Mediterranean: 1/			
Doble Fina.....	324	5.00	5.00
Sanguinelli 2/.....	324	7.00	6.40
Valencia.....	324	-	7.40
Verna.....	324	-	6.50
Shamouti.....	336	3.50	-
California:			
Navel.....	344	4.50	4.60

1/ All from Spain except Shamoutis, which were from Israel.

2/ Offered in only small volumes.

Source: Priced catalogs of B. M. Spiers, Leon Van Parys, and Gerard Koninckx Freres, Antwerp. Quotations are modal averages.

Lemons.--California lemons compete in Belgium with lemons from Italy and Spain. The short crop of Italian Verdelli lemons, together with Russian purchases of Italian lemons, kept these fruits off the market in the summer of 1953. The Spanish Vernas usually sold at lower prices than the California fruit; some lots of them were observed to be in poor condition. On the Antwerp auctions of May 26, 1953, California fruit brought \$10.70 per size-360 box, and prima-grade Italian fruit in the same size box brought \$9.20; on June 2 size-360 California fruit brought \$8.60, and size-324 Spanish Verna lemons brought \$6.94. Better selection and packing is an important factor in the ability of California fruit to obtain premium prices; the California lemons seen in August were generally in excellent condition, the fruit being firm and bright and the buttons green.

The cardboard carton as an export container for lemons has apparently met with outstanding success in Belgium. Importers, wholesalers, and retailer all expressed satisfaction with it. Favorable reception by the trade is reflected in prices paid on the Antwerp auctions; on five different days in June and July the prices for California lemons packed in standard boxes and in half-box cartons were compared, and on each day the cartons brought more than half the prices for the boxes (table 20). In fact, on all days but one, 2 cartons brought 50 cents more than 1 box.

Table 20.--Prices for California lemons in standard boxes (size 360) and in half-box cartons (size 180) on the Antwerp auctions on specified days, June and July 1953

Day	Boxes		Cartons	
	In Belgian francs	In U.S. dollars	In Belgian francs	In U.S. dollars
June 2...	430	8.62	235	4.71
June 9....	495	9.93	272	5.46
June 16...	430	8.62	230	4.61
June 23...	430	8.62	237	4.75
July 15...	480	9.63	243	4.87

Source: Priced catalogs of B.M. Spiers, Leon Van Parys, and Gerard Koninckx, Freres, Antwerp.

One retailer stated that, since the carton was sealed, the fruit was kept clean without being separately wrapped; no one expressed any objections to the fruit's being unwrapped. Several, particularly women, commented that the carton was more easily handled than the box. Most retailers stated that the carton had not had the effect of reducing the quantity of fruit they purchased at a time; that for every 20 boxes they once ordered they now ordered 40 cartons.

No objection was made to the use of diphenyl in the cartons.

Some cartons were seen that had been slightly crushed. It might be desirable to investigate means of strengthening the corners. Retailers who were interviewed stated that in slightly crushed boxes they had found no decay. In Brussels, wholesalers expressed the opinion that lemons packed unwrapped in cartons showed less decay than wrapped lemons packed in standard boxes. Although this was true generally for some brands, a few shippers of certain brands were finding in some cartons a decay that seemed to be a blue mold. The condition of repacked cartons indicated that any decay in a carton seriously affects all fruits in the package. Mold from affected fruit adheres to sound fruit, making it unsightly and prone to decay. It would seem that fruit should be washed, preferably with a fungicide, before it is repacked in a carton that has once contained moldy fruit. This practice is suggested as desirable with full realization of the difficulty the trade would have in carrying out such procedure in Europe; for without such a washing procedure a repacked carton of lemons is of little value.

Market for Florida Fruit

Oranges.--The Florida Valencias that arrived in Belgium in a sound condition in 1953 were well received by the trade. On June 9 the Florida boxes, which were heavier than the California boxes, brought higher prices (table 21). This fact is evidence that, if Florida fruit could be so handled as to arrive in sound condition, it could find a place in this market. Florida fruit is in a good competitive position because it pays lower freight charges than the California fruit; importers can therefore pay more for Florida oranges and still make higher returns than on California fruit.

Despite these advantages, importers show little interest in importing Florida oranges because of the heavy losses some of them experienced again in 1953, when the waste in some lots of Florida oranges was as high as 40 percent.

Processed Products.--Florida single-strength citrus juices dominate the Belgium market and are offered for sale in nearly every food store. Retailers who were interviewed in 1953 expressed the opinion that the consumption of these juices is growing slowly. The No. 2, or 20-ounce, can is the most popular size; however, some juice is for sale in 46-ounce cans, and a few outlets would use a 6-ounce can if it were available under the exports-payments programs (for retail prices, see table 22).

Table 21.—Prices for Florida and California Valencias
on the Antwerp auctions, June 9, 1953

Size	Florida Valencias		California Valencias	
	In Belgian francs per 44-kilo box	In U.S. dollars per box	In Belgian francs per 36-kilo box	In U.S. dollars per box
	francs per 90-pound box	per 77-pound box	francs per 36-kilo box	per 77-pound box
176	380	7.60	-	-
250 and 252	410	8.20	405	8.10
288	407	8.14	385	7.70

Source: Reports from the trade.

Table 22.—Retail prices for processed Florida citrus products in Belgium, August 1953

Product and size of container	In Belgian francs	In U.S. cents
Single-strength juice, unsweetened:	:	:
Orange:	:	:
16 ounces.....	6.5	13
20 ounces.....	6.8	12 - 16
46 ounces.....	16.5	33
Grapefruit:	:	:
20 ounces.....	5.5 - 7	11 - 14
46 ounces.....	16	32
Orange-grapefruit blend, 20 ounces:	6.5	13
Frozen concentrated juice:	:	:
Orange, 4 ounces.....	17	34
Grapefruit, 6 ounces.....	18	36
Orangeade mix, 6 ounces.....	17	34

Source: Observations of author in retail markets.

Frozen concentrated juices, both orange and grapefruit, were available in a few outlets in 1953, but retail prices were high for such unknown items; for instance, a 6-ounce can of the orange juice cost 36 U.S. cents. High prices, however, were not the only reason for the slow sales of these products: the lack of refrigeration in homes was also a factor.

Point-of-sale advertising might help sales of the processed products; and, as some retailers suggested, demonstrations at fairs might be helpful in developing demand.

Outlook

With the increasing demand for citrus in Belgium, imports from the United States should be larger in 1954 than they were in 1953. Lemons are well established at premium prices in the summer market. Florida Valencias could be sold in the spring if sound arrivals were assured; perhaps as much as 200,000 boxes could be successfully marketed each year, but to reach this volume arrivals would have to be in much better condition than in recent years. Of California Valencias, as many as 750,000 boxes may be sold in 1954 at c.i.f. prices about the same as those in 1953.

Denmark

In the summer of 1953 Denmark was well supplied with fruit, including citrus. Retail prices were modest, with apples selling at about 5 cents a pound in August and grapes at 15 cents a pound. One importer, in observing that fruit consumption had increased greatly over prewar levels, cited imports of bananas as an example: instead of 7,000 metric tons imported annually before the war, 25,000 tons were imported in 1953, from February to September. He observed further that if banana imports were not restricted during the domestic apple harvest, from September through February, the annual imports would be even larger, about four times the prewar level.

Importers report that several factors contribute to the increased consumption and imports of fruit in Denmark: (1) Economic circumstances have improved for rural people, changing their diets to include more fruit; (2) a new attitude prevails toward savings: before the war people had confidence in money and saved it; but now, remembering their experience with devaluation and feeling that the government will take care of them, they are willing to spend their money; and (3) a change in price relationships has made some fruits inexpensive when compared to other goods; an orange, for instance, priced at 0.30 Danish crowns, or 4 cents, costs no more than two cigarettes.

Fresh citrus fruit

Imports of fresh oranges into Denmark have increased steadily from 1948 through 1952, reaching a total in 1952 that was 2-1/2 times higher than that in 1938. This increase reflects partly a 10-percent rise in the index of production between 1949 and 1952 (table 23).

Shortage of dollars has resulted in government restrictions against imports from the United States. Most summer imports come from South Africa which supplies oranges and grapefruit, and from Spain and Italy, which supply lemons. In August 1953 South African Valencia oranges were being imported at the Continental price of 36 and 37 shillings, or \$5.06 and \$5.20, c.i.f. Copenhagen. Italian lemons were high-priced, selling for about 145 lire per kilo, or \$1 per box, f.o.b. Sicily; Spanish lemons, Verdellis, were selling for 42 Danish crowns, or \$6.09, per box, f.o.b. Murcia. In September Reale lemons from Malaga were quoted at 35 crowns, or \$5.07, per box, f.o.b. Malaga.

Freight rates per box from various countries were quoted by the trade in 1953 as follows (importers said they considered the rate from Spain high):

From Israel, ventilated stowage...6 shillings, or 84 cents
From Spain, ventilated stowage, 4.25 crowns, or 62 cents
From Brazil, refrigerated stowage..11 shillings, or \$1.55.

Table 23. - Industrial-production index and gold and dollar holdings in Denmark compared with that country's total imports of oranges and with United States exports of oranges to Denmark, 1938 and 1948-53

Year	Industrial- production index (1948=100)	: Gold and : Industrial- dollar : Total : holdings : orange : December : imports : : 1/ : : : : : : Million : 1,000 : : dollars : boxes : : : : : : : :	U.S. exports of oranges 2/ 1,000 boxes
1938	77	60	316 3/
1948	100	77	131 -
1949	107	70	552 4/
1950	118	76	569 -
1951	121	76	673 -
1952	115	101	818 4/
1953	3/ -	5/ 100	3/ - 3/

1/ Exclusive of official gold holdings not reported.

2/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

3/ Not available.

4/ Less than 500 boxes.

5/ As of May.

Source: Index and holdings, Mutual Security Agency, Reports to Congress; imports, official Danish sources; exports, U.S. Bureau of the Census.

Restrictions on citrus imports from the dollar area will probably continue through the next season unless some unexpected opportunity arises to pay for the fruit with local currency or to procure it through barter, a means of trade with the dollar area that the Danish Government has not thus far favored. If a way could be found to import citrus from the United States, imports of oranges from that source would probably be about twice the prewar average, or 100,000 boxes.

California oranges could easily compete in Denmark at the prices that were observed there in August 1953 (table 24). At a retail price of 0.30 crowns, or 4 cents per orange, a size-252 box would retail for 75.60 crowns, or \$10.97.

Indications are that citrus imports into Denmark will continue to increase from Italy and Spain. If Mediterranean citrus supplies are at about the same level in 1953-54 as they were in 1952-53, then Denmark may be expected to have the highest citrus imports in history.

Processed Citrus Products

If Denmark could find a way to import citrus fruit from the United States, the greatest increase in imports from that source would probably be in processed products, first in hot-pack concentrates for the bottling industry, and second in single-strength juices.

The only citrus products the author noted in Denmark in August 1953 were single-strength orange and grapefruit juices from Israel, selling in a few retail stores for 2 Danish crowns, or 29 cents, for a No. 2 can - a price that makes citrus juice a luxury item. These products are as yet little known in the Danish market and are not a popular item in general distribution.

Table 24. - Retail prices for citrus fruit and other fruits and vegetables in Copenhagen, August 1953

Item	In Danish crowns	In U.S. cents
Citrus fruit:	:	:
Oranges, South African	:	:
Valencias.....	: 0.30 each	: 4 each
Lemons, Spanish and	:	:
Italian.....	: 3 per kilo	: 20 per pound
Grapefruit, South African	: 0.80 each	: 12 each
Pears.....	: 2 to 3 per kilo	: 13 to 20 per pound
Apples.....	: 1.50 to 1.70 per kilo	: 10 to 11 per pound
Plums:	:	:
White.....	: 2 per kilo	: 13 per pound
Dark.....	: 1.70 per kilo	: 11 per pound
Bananas, Congo.....	: 2.70 per kilo	: 18 per pound
Grapes.....	: 5 per kilo	: 33 per pound
Tomatoes.....	: 1.50 per kilo	: 10 per pound

Source: Observations of author in retail markets.

France

French imports of citrus fruit reflect certain conditions in the country's economy. Imports of oranges, for instance, have risen steadily between 1948 and 1952, as have both the index of industrial production and the gold and dollar holdings (table 25). Although the country's recovery has been relatively slow, the advance of the industrial-production index is an encouraging factor; abundant production means that, although France may not yet have dollars with which to buy citrus, it is likely to have commodities to exchange for it in barter. The gold and dollar holdings, despite the gradual increase, are still far below the prewar holdings and are exceeded by those of both Belgium and Switzerland. This circumstance indicates that free imports of United States citrus are not yet in sight.

Most of the oranges France imported from the United States in 1952-53 - about 500,000 boxes of California summer fruit - were obtained by barter trading. The rest were obtained by the "bonus dollars" that exporters received for their shipments to the dollar area. This source of foreign exchange, however, was closed off by government decree in September 1953; and, if some plan is not substituted for it, importing of citrus from the United States will be seriously handicapped. It is the general opinion of the trade that French exports will have to be supported by some type of program and that the program will include a way for continuing imports of United States citrus.

Table 25. - Industrial-production index and gold and dollar holdings in France compared with that country's total imports of oranges and with United States exports of oranges to France, 1938 and 1948-53

Year	Industrial production index (1948 =100)	Gold and dollar holdings Million dollars	Total orange imports 1,000 boxes	U.S. exports of oranges 1,000 boxes
1938	90	2,952	5,779	3/ 220
1948	100	794	7,590)	4/
1949	110	740	12,386)	21
1950	111	835	13,620	5/ -
1951	125	902	15,681	322
1952	131	975	17,402	169
1953	6/ -	7/ 887	6/ -	6/ -

1/ Exclusive of gold holdings not reported.

2/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50, 1951 means 1950-51, etc.

3/ 1935-39 average.

4/ 1945-49 average.

5/ Less than 500 boxes.

6/ Not available.

7/ As of May.

Source: Index and holdings, Mutual Security Agency, Reports to Congress; imports, official French sources; exports, U.S. Bureau of the Census.

The demand for citrus in France is illustrated by the high retail prices for oranges that have prevailed in 1953 (table 26). Lemon prices, too, have been consistently high. The high price level is a "trading margin," for, if abundant supplies of winter oranges should result in a retail price of 60 francs per kilo, or 8 cents per pound, consumption would increase greatly; costs of production and distribution indicate that this price is possible at some future time without loss to either producer or handler.

Local deciduous fruits, chiefly pears and apples, compete with citrus fruit in the French markets. France's 1953-54 apple and pear crops are somewhat smaller than those of last year, but the quality of this year's crop is said to be better and will probably result in better marketing conditions.

The French import trade anticipates that orange imports will continue to increase if Mediterranean supplies are available, particularly from Spain and North Africa. Some importers estimate that consumption may increase by approximately 1 million boxes per year; if this estimate is realized, France may import something over 18 million boxes of oranges in 1954. It is thought that the use of fresh citrus juices is increasing and so will tend to increase per capita consumption of oranges.

Thus, if a new system of trading is not authorized by the French Government, imports of both fresh and processed fruit from the United States in 1954 will have to be arranged entirely through barter trading, for there is little chance of free-dollar purchases. One of the most important factors in successful barter trading is to have a French representative who has contacts and is conversant with all of the intricacies of this type of business.

Market for Fresh Citrus Fruit

The small imports of oranges from the United States in 1952-53 did not even begin to satisfy the French market. But lower import costs and lower retail prices are necessary before volume can be expanded significantly. At present both import costs and retail prices are high, as a result of the trade restrictions in force. Importers report, for example, that in 1953 a box of California oranges, which could be landed in Europe for about \$4.25 c.i.f., cost about \$9 in France after currency premiums and import duties were paid. If summer California oranges could be imported without paying import premiums, a retail price of about 100 francs per kilo, or 13 cents per pound, would probably be possible - a price that would expand United States market opportunities to a considerable extent, to at least 1 million boxes of fruit from May through September.

France has entered into a trade agreement with Israel under which 4,000 metric tons (110,230 boxes) of grapefruit and 6,000 metric tons (188,966 boxes) of oranges will be imported in the 1953-54 season. And France and Spain have concluded a trade agreement whereby France will import up to 220,000 metric tons (6,928,744 boxes) of citrus from Spain in the 1953-54 season.

Market for Processed Citrus Products

France is importing some United States citrus juices, which sell at prices from 90 francs, or 26 cents, to 160 francs, or 46 cents, per No. 2 can, depending on the class of retail shop. If prices were lower, some importers say, consumption would increase greatly. Grapefruit juice is preferred over orange juice, and United States juices are preferred over those from North Africa. Considering that most imports in the future probably will have to be made through barter trading, imports of citrus juices would be facilitated greatly if a free port could be

established for the storage of juice stocks. Such an arrangement would permit prompt deliveries to meet delivery deadlines, which are often an important factor in barter dealing.

Any merchandising efforts in France must be coordinated with import trading, for it would be unwise to advertise either fresh or processed products until imports in sustained volume are reasonably assured.

Table 26. - Average retail prices for oranges, lemons, pears and apples in Paris for specified periods, December 1952 to November 1953

	<u>Oranges</u>		<u>Lemons</u>		<u>Pears</u>		<u>Apples</u>
Period	French: U.S. francs:cents per kilo		French: U.S. francs:cents per kilo		French: U.S. francs:cents per kilo		French: U.S. francs:cents per kilo
<u>1952:</u>	:	:	:	:	:	:	:
December 2-5.	91.3	12	130.5	17	114.5	15	82.9 11
<u>1953:</u>	:	:	:	:	:	:	:
January 6-10.	37.4	11	129.1	17	133.0	17	83.6 11
February 3-7.	100.9	13	121.5	16	162.3	21	85.1 11
March 3-7....	100.4	13	109.8	14	182.2	24	87.0 11
April 7-11...	100.6	13	119.8	16	154.2	20	96.1 12
May 5-9.....	106.3	14	115.5	15	-	-	105.4 14
June 2-6.....	132.4	17	126.9	16	-	-	114.5 15
July 7-11....	160.2	21	124.5	16	-	-	124.8 16
August 4-8...	168.4	22	129.7	17	101.0	13	190.0 25
September 1-5	165.4	21	121.7	16	96.1	12	111.1 14
October 6-10.	146.0	19	169.1	22	112.3	15	98.2 13
November 3-7.	162.0	21	146.4	19	125.0	16	97.3 13
	:	:	:	:	:	:	:

Source: Institut National de la Statistique et des Etudes Economiques, Paris

Western Germany

The rapid rise in Western Germany of the industrial production index and of gold and dollar assets indicates the recovery that the country's dynamic economy has accomplished in the past few years. It is this recovery that will make Germany one of our best customers for citrus and citrus products. The correlation between the two economic indicators cited and the total imports of oranges is a close one (table 27), and for good reason. Most of the citrus fruit consumed in Germany is consumed in the urban industrial areas; and the level of gold and dollar holdings should be fairly indicative of the extent to which the Government could make dollars available for purchase of citrus.

Since free dollars have been available only for the import of essential commodities, imports of United States citrus into Germany have been made possible through "compensation trading." The German Government has permitted this trading to dispose of hard-to-sell items. From time to time the government reconsiders its policy on this type of trading; the current authorization expires on December 31, 1953, and at that time policy will again be determined.

The vigor of the German economy and its capacity to product for export can be a means of increasing purchases of United States fruit and fruit products only to the extent that they can be sold in the dollar area. Any assistance the United States citrus industry can give in placing German surplus commodities in dollar markets will be a means of assuring Continental trade in United States citrus.

Table 27. - Industrial-production index and gold and dollar holdings in Western Germany compared with that country's total imports of oranges and with United States exports of oranges to Western Germany, 1938 and 1948-53

Year	Industrial- production, index (1948=100)	Gold and dollar holdings, December 1/ Million dollars	Total orange imports 1,000 boxes	U.S. exports of oranges 2/ 1,000 boxes
1938	193	219	2,708	3/ 39
1948	100	179	52)	4/ 2
1949	144	149	2,651	
1950	182	222	7,708	8
1951	218	434	7,734	-
1952	233	691	9,447	314
1953	5/	6/ 893	5/	5/

1/ Includes dollar holdings of Americans residing in Germany.

2/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc. 3/ 1935-39 average. 4/ 1945-49 average. 5/ Not available. 6/ As of June.

Source: Index and holdings, Mutual Security Agency, Reports to Congress; imports, official German sources; exports, U.S. Bur. of the Census

The competition that citrus fruit must meet during the summertime from the domestic soft fruit is clearly indicated by retail fruit prices noted in Germany during August 1953 (table 28). Plums and apricots, for instance, were selling at low prices. The domestic fruit is abundant in August and early September; and the sale of imported southern fruit is usually slow at this time.

Newspaper advertising is reported to be effective in Germany for promoting sales of citrus fruit and fruit products. Retailers who were interviewed stated that they could use more point-of-sale advertising, particularly small colored cards, for displays of fresh fruit. There is also interest in point-of-sale advertising for canned juices.



Lemons in German markets, summer 1953: Above, from Spain, thin-skinned and acid; below, from Chile, thick-skinned and less acid.



Boxes of Chilean lemons just arrived in Hamburg, August 1953.



These lemons from Chile are well-graded but rather loosely packed.



Lemons from Spain are shipped in a strong two-compartment box.



Longshoremen in a German port unload United States lemons packed in cartons.



Casks of citrus juice and pulp from Italy arrive in Hamburg for use in the German bottling industry.

Table 28. - Retail prices for citrus fruit and for other
fruits and vegetables
Western Germany, August 1953

Item	In German marks	In U.S. cents
Citrus fruit:		
Oranges:		
South African Navel:		
Large.....	0.40 each	10 each
Small.....	0.20 each	5 each
California Valencias.	0.16 to 0.25 each	4 to 6 each
Lemons:		
Chile, 324.....	0.20 each	5 each
Italy, large.....	0.25 each	6 each
California, 360.....	0.25 each	6 each
Grapefruit, California.	0.35 to 0.55 each	8 to 13 each
Other fruits & vegetables:		
Apples.....	1.40 per kilo	15 per pound
Plums.....	0.50 per kilo	5 per pound
Pears, small (poor)....	0.70 per kilo	8 per pound
Peaches.....	1.60 per kilo	17 per pound
Apricots, small.....	1.00 per kilo	11 per pound
Grapes:		
Dark.....	3.60 per kilo	39 per pound
White.....	2.00 per kilo	22 per pound
Bananas.....	0.17 each	4 each
Tomatoes, small.....	0.80 per kilo	9 per pound

Source: Observations of author in retail markets.

Oranges

In 1953 Western Germany imported more oranges than at any other time in its history, several times more than all Germany imported before the war. Its imports in 1953 will be more than 15 million boxes, compared with almost 9.5 million boxes in 1952 and 2.7 million in 1949, making Western Germany the world's second largest importer of oranges, surpassed only by France. In 1954 its imports will probably increase again to the extent that Western Germany will become the world's largest importer.

The increased demand for oranges in Western Germany is reflected in increased imports from both Spain and the United States. In the 1952-53 season more than 10 million boxes came from Spain, compared with less than 4 million in 1951-52. At least half a million boxes are coming directly from the United States in 1953, both directly and through the Netherlands; altogether they will make up the largest United States citrus export to Germany since the war.

German importers made excellent profits in 1953 on the California Valencias that had been imported directly from the United States, but only modest returns on those that had been bought from the Netherlands, at Rotterdam auction prices.

The market for California Valencias was good during May, June and July; size- $3\frac{1}{4}$ fruit generally brought 28 to 30 marks, or \$6.61 to \$7.15 per box. The market fell at the beginning of August and on August 13 some brands of California fruit sold for as little as 18 marks, or \$4.29 per box. On the same day other brands brought 24.50 marks, or \$5.84, indicating that there was considerable variation in condition of fruit.

Florida Valencias would be accented by the German market in the spring if importers could be assured that the fruit would be in sound condition upon arrival. If Florida can solve the problem of decay during shipment, it would be able to make full use of its advantage in freight costs and could possibly develop a market in Germany for as much as 250,000 boxes per year.

In an auction at Hamburg on August 13, where both California and South African oranges were being sold, the correlation between size and price was noted (table 29). The few South African fancy-grade Valencias that were offered sold at the same price regardless of size - 22.75 to 24.50 marks, or \$5.42 to \$5.84 per box. But both fancy California Valencias and South African standard Navel's did show price-size relationships, in opposite directions. The California Valencias, which sold for more than the South African, got higher prices for larger fruits; and the South African Navel's got higher prices for smaller fruits. These price relationships correlated with the quantity of each size available in the market; most of the California Valencias were small, and most of the South African Navel's were large.

In this connection it is interesting to note that in retail markets where fruit was being sold per unit, the author saw large South African Navel's, about 80's, being sold for twice as much as small California Valencias (table 28). Had they been sold by the pound, the prices would have been more nearly equal.

Table 29. - Prices for California Valencia oranges (fancy grade) and South African oranges (standard grade) on German auctions, by size, August 13, 1953

Size	California Valencias		South African Navel	
	In German marks per box	In U.S. dollars per box	In German marks per box	In U.S. dollars per box
	:	:	:	:
96..	—	—	20.25	4.83
112..	—	—	20.25	4.83
126..	—	—	23.00	5.48
150..	—	—	24.00	5.72
176..	30.75	7.33	24.25	5.78
200..	30.75	7.33	25.75	6.14
216..	—	—	25.00	5.96
220..	28.50	6.79	—	—
252..	26.00	6.20	25.00	5.96
288..	24.50	5.84	25.00	5.96
324..	—	—	25.00	5.96
344..	24.00	5.72	—	—
360..	—	—	25.00	5.96
420..	—	—	25.00	5.96
	:	:	:	:

Source: Report from the trade.

Lemons

California lemons compete in Western Germany with fruit from other areas, notably from Spain, Italy and Chile. At the July auction in Hamburg, for instance, a box of size-360 California lemons was selling for 48 marks, or \$11.44 compared with 32.75 marks, or \$9.48 for size-324 Spanish lemons, and 42 marks or \$10.01 for size-360 Italian prima-grade Verdellis. On August 13 California lemons packed in cartons sold at auction for 1.38 marks per kilo, or 15 cents per pound, compared with 0.94 mark per kilo, or 10 cents per pound, for lemons from Chile.

Most of the fruit from Chile was observed to be smaller than the Spanish Vernas. Fruit was individually wrapped and shipped in a two-compartment wooden box weighing about 33 kilos, or 73 pounds. Grading and sizing seemed to be uneven. Retailers stated that they found some decay in each case and that in general they preferred California fruit because it looked better and was in better condition. In normal years it would seem that some California lemons would be sold in Germany in July, August and September. In August 1953, when 360-size lemons were retailing at 0.25 mark or 6 cents each, a box brought more than \$20.00.

The half-box lemon carton has been well received by the trade in Germany; but some consumer resistance has been expressed against the diphenyl impregnate in these cartons.

Processed Citrus Products

Canned citrus juices are well established in Western Germany, and retailers report that sales are increasing. Consumers find these products economical. Canned grapefruit, for example, is a good bargain; at August 1953 prices a No. 2 can sold for 0.75 marks, or 18 cents (table 30); its equivalent in fresh fruit, about 6 grapefruits (at 0.35 marks, or 8 cents a piece), sold for 2 marks, or 48 cents. In addition to the economy, some retailers said, the convenience of the can is a factor that makes canned juices appealing to consumers.

Orange and grapefruit juice seem to be in about equal demand; blended juice is offered for sale but is less well known. In summertime these products are consumed as a between-means drink, mixed with soda water; they are rarely on the breakfast menu. In wintertime, when sales are reported to be slower, they are served primarily for health's sake, as in hot drinks taken as a treatment for colds.

Florida juices were widely displayed in 1953. Most of them were in No. 2 cans; but 46-ounce cans were offered in some of the larger shops. If a can smaller than the No. 2 were available, some retailers would probably use it as an experiment, but most retailers seem convinced that the No. 2 can is the ideal size.

Grapefruit segments are not well known in Germany and are in small demand. High duties on this item keep retail prices high. Only a few cans were seen in retail shops; but most stores had small cans of Japanese tangerine sections.

Table 30. - Retail prices for processed citrus products in Western Germany,
August 1953

Product	Unit	Retail price	
		In German marks	In U.S. cents
		:	:
Single-strength juices, from Florida:	:	:	:
Orange:	:	:	:
Unsweetened.....	: 20-ounce can	: 0.75 - 0.90	: 18 - 21
	: 46-ounce can	: 1.80 - 2.15	: 43 - 51
Sweetened.....	: 20-ounce can	: 0.78	: 19
Grapefruit juice:	:	:	:
Unsweetened.....	: 20-ounce can	: 0.75 - 0.85	: 18 - 21
Orange-grapefruit blend.....	: 20-ounce can	: 0.72 - 0.75	: 17 - 18
Concentrated orange juice:	:	:	:
Frozen, from Florida.....	: 6-ounce can	: 1.30	: 31
Hot-pack, from Spain 1/.....	: 90-gram tube	: 0.50	: 12
Grapefruit sections, from Florida.	: 20-ounce can	: 1.60	: 38
Tangerine sections, from Japan....	: 310-gram can	: 1.50	: 36
	:	:	:

1/ Concentrated 7-1/4 times.

Source: Observations in retail stores.

Frozen concentrated orange juice from Florida was for sale in 6-ounce cans in a few stores in Hamburg. A large department store selling this product reported that consumers liked the quality but found the product expensive at 1.30 marks, or 31 cents per can. The greatest obstacle to sales of frozen juice is the lack of refrigeration in homes. A smaller can might help to introduce the product to consumers. Point-of-sale advertising might also be helpful.

A hot-pack concentrated orange juice from Spain, 7-1/4 times concentrated, was available in some stores. It is packed in 90-gram, or 3-ounce tubes. In August 1953 it was being actively promoted in some large stores; the product was conspicuously displayed and sample drinks were offered to interested customers. But this is a new product and a new package, and it is too early to evaluate consumer acceptance of it.

Outlook

The increasing recovery of Western Germany, together with the satisfactory summer market that existed for citrus in 1953, seems to indicate that United States citrus exports to Western Germany will increase in 1954. In direct sales to Germany they will probably exceed 500,000 boxes; besides, substantial quantities of United States fruit are likely to arrive via the Netherlands. Increased direct imports by Germany from the United States do not necessarily imply a corresponding reduction in our sales to the Netherlands.

Some Florida oranges can be exported in the spring if sound condition can be assured.

California lemons have an established market but must compete with fruit from Italy, Spain and Chile.

The Netherlands

Despite the losses suffered in the devastating flood of February 1953, the Netherlands has shown remarkable economic improvement during 1953, an improvement that has resulted in a more normal citrus trade than at any other time since the war. This favorable change reflects the continued economic improvement in surrounding countries, particularly Germany.

Two evidences of the country's economic development are the rising index of production and the increased gold and dollar holdings (table 31). The former has risen steadily since the war; the latter has increased to the extent that in May 1953 it was two times as large as in 1949 and nearly three times as large as in 1948. The improvement in the economic position of the Netherlands has made possible a steady increase in the imports of oranges from 1948 through 1952; certainly the improved financial position of the country will be the major factor in continuing imports of citrus fruits and citrus products.

The availability of the bonus dollar, which in the summer of 1953 was selling at 4.20 guilders, compared to 5.60 guilders in 1952, has been the basis of our citrus trade with the Netherlands for the past few years. This dollar exchange, combined with the transit business, has

increased the distribution of United States citrus fruit in the Netherlands. Reports indicate that the bonus dollar scheme is being discontinued by the Netherlands Government; but it has also been stated that once bonus dollars are no longer available, dollars will then be allocated so that imports of citrus and citrus products may still continue.

Table 31. - Industrial-production index and gold and dollar holdings in the Netherlands compared with that country's total imports of oranges and with United States exports of oranges to the Netherlands, 1938 and 1948-53.

Year	Industrial-production index (1948 = 100)	Gold and dollar holdings December	Total imports of oranges	United States exports of oranges 1/
		Million dollars	1,000 boxes	1,000 boxes
1938..	83	1,059	2,533	2/ 152
1948..	100	290	1,110	3/ 119
1949..	112	366	1,455	
1950..	123	505	1,920	283
1951..	129	465	2,493	474
1952..	130	747	2,381	712
1953..	4/	5/ 819	4/	4/

1/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

2/ 1935-39 average.

3/ 1945-49 average.

4/ Not available.

5/ As of May.

Source: Index and holdings, Mutual Security Agency, Reports to Congress; imports, official Netherlands sources; exports, U.S. Bureau of the Census.

In 1953 the fruit importers of Rotterdam found the transit business reestablished to a degree where it was the major factor in the citrus market. By this transit business, which is made possible by special Dutch exchange legislations governing the use of dollars earned in transit trade. The Netherlands sold thousands of boxes of American citrus and cases of canned goods to several countries, but chiefly to Germany, Belgium, Sweden, Switzerland, and France. As economic conditions in Western Europe continue to improve, transit trading in citrus and citrus products may be expected to expand.

In August, when the author visited Belgium, domestic soft fruits were selling at prices that were highly competitive with the expensive imported citrus fruits (table 32).

Table 32. - Retail prices for California citrus and for other fruit,
in the Netherlands, August 1953

Item	In Dutch guilders	In U.S. cents
California citrus:		
Oranges (Valencias)...	0.10 to 0.20 each	3 to 6 each
Grapefruit.....	0.20 each	6 each
Lemons.....	0.15 each	4 each
Other fruit:		
Peaches (hothouse)....	0.12-1/2 each	3 each
Plums:		
Blue.....	0.20 to 0.40 per kilo	2 to 5 per pound
Yellow.....	0.60 per kilo	7 per pound
Apples.....	0.40 to 0.50 per kilo	5 to 6 per pound
Pears (small, cooking)	0.12 $\frac{1}{2}$ per kilo	1 per pound
Tomatoes.....	0.55 per kilo	7 per pound

Source: Observations of author in retail markets.

Oranges

From California. - In 1953, when the supply of Navel oranges from Spain was reduced by the depredations of the Mediterranean fruit fly, encouragement was given to early imports of California Navel oranges into the Netherlands. But by the time the California Navel oranges reached that market, white and blood oranges from Spain had come into abundant supply, lowering the prices and losing money for many of the importers who had brought in early California fruit.

For the importers of California Valencias, 1953 was a good year. The market for these oranges started to improve in the middle of April and remained high through May, June and July, bringing good prices (table 33). In fact, all during the summer, California oranges dominated the Netherlands market. Some Surinam oranges and grapefruit^{1/} also were on the market; but South African oranges, at a Continental price of 36 to 37 shillings, or \$5.04 to \$5.18 per box, had been priced out of the market.

From Florida. - Florida orange growers received more for their exports to the Netherlands in 1953 than California growers did. With Florida fruit paying less freight, Netherlands importers could afford to pay more for Florida fruit than for California and still make more money. When Florida oranges were received in good condition, they sold at prices per box that were generally equal to those for other oranges (table 34). Of course, the Florida box is heavier than either the California or Spanish box, but even so, the prices make a creditable showing and indicate that if Florida fruit could arrive in good condition, the Netherlands would have a market for as

^{1/} Surinam is now using a wirebound Florida box instead of the old heavy handmade crate.

much as 200,000 boxes in April, May and June. The lower prices for Florida Valencias on June 10 indicate the price differentials that exists when Florida boxes contain a good deal of decay. It is the propensity of Florida fruit to decay during prolonged shipping that makes it a greater risk to importers than California fruit.

Table 33. - Prices for California Valencia oranges, size-344 box, on the Rotterdam auctions on specified days, April-June 1953

Date	In Dutch guilders		In U.S. dollars	
	High	Low	High	Low
April 15	19.00	1/	5.02	1/
April 25	21.50	20.50	5.68	5.41
May 7	27.00	26.75	7.13	7.06
May 13	27.75	26.00	7.33	6.87
May 19	29.25	29.00	7.72	7.66
May 28	29.50	1/	7.79	1/
June 3	27.50	26.00	7.26	6.87
June 10	30.25	26.75	7.99	7.06
June 17	24.25	24.00	6.40	6.34
June 24	25.00	24.50	6.60	6.47
July 1	26.00	25.50	6.87	6.73
July 8	28.00	27.75	7.39	7.32
July 15	27.25	26.75	7.20	7.06
July 29	21.50	20.00	5.68	5.28
August 6	18.75	18.00	4.95	4.75
August 12	17.00	16.50	4.49	4.36

1/ Only one sale was made.

Source: Reports from the trade.

Lemons

California lemons are appreciated in the Netherlands for their fine pack and appearance; but several tradespeople have stated that the Spanish and Italian lemons have more flavor.

The half-box lemon carton has been well received by the Netherlands trade and, at the auctions, has generally sold at higher prices than the box (table 35). Some members of the trade have expressed the opinion that the carton now in use is a rather drab package and that a more attractively colored carton would be an aid to merchandising.

Some Spanish lemons were on the summer market in 1953; in a wholesale shop in August, Spanish Verna lemons were seen selling at 22 guilders, or \$5.81 per box of 324 fruits, compared to a half-box carton of 150 California lemons at 16.50 guilders, or \$4.36.

Processed Citrus Products

Single-strength citrus juices from the United States compete in the Netherlands with juices from other parts of the world, in both quality and price. Trade sources report that in July 1953 United States products were meeting most competition from the West Indies, which was quoting cases of 24 No. 2 cans of grapefruit juice at 17 shillings 6 pence, or £2.46, c.i.f. Rotterdam. Competition was coming also from Israel, which in May 1953 quoted similar cases of juice at 26 shillings, or £3.46, c.i.f. Rotterdam, as well as cases of grapefruit sections at 30 shillings 4 pence, or £4.26. Under some circumstances - such as when dollars are paid -- juice from Israel may be obtained at discounts up to 30 percent.

Table 34. - Prices for oranges from Florida, California, Spain and Israel, on the Rotterdam auctions on specified days, April and June, 1953

	: Florida 1/	: California 1/	: Spain 2/	: Israel 3/
Date and size of box	: Dutch guil- ders per box	: U.S. dol- lars per box	: Dutch guil- ders per box	: U.S. dol- lars per box
April 29:	:	:	:	:
175 or 176	: 21.50	5.68	: -	: -
216 or 220	: 22.75	6.01	: 22.75	6.01
252.....	: 23.00	6.07	: 22.75	6.01
233.....	: 22.00	5.81	: 22.75	6.01
June 3:	:	:	:	:
175 or 176	: 21.00	5.55	: -	: -
216 or 220	: 24.25	6.40	: -	: 25.50
252.....	: 25.75	6.80	: 26.00	6.37
233.....	: 27.50	7.26	: 25.75	6.80
June 10:	:	:	:	:
216.....	: 18.50	4.89	: 27.00	7.13
252.....	: 20.25	5.35	: 26.75	7.06
233.....	: 21.75	5.74	: 26.75	7.06
	:	:	:	:

1/ Valencias. 2/ Comunas (April 29) and Vernas (June 3). 3/ Shamoutis.

Source: Reports from the trade.

In the Netherlands most citrus juice is consumed in the summer. Orange is the most popular juice, making up 65 percent of all sales. The rest are almost all grapefruit juice; blended juice is a minor item. Florida products dominate the market.

Most of the single-strength juice is sold in No. 2 cans. The larger 46-ounce can is rarely seen. As to the value of a 6-ounce can, opinion is divided: some trade sources state that demand for it would be insignificant; others, that such a size would be popular with persons who bought juice for only one child or with persons who had only a few cents to spend at a time.

Table 35. - Prices for California lemons in standard boxes (size 360) and in half box cartons (size 180) on the Rotterdam auctions on specified days, June and July, 1953

Date	B o x e s				C a r t o n s			
	In Dutch		In U.S.		In Dutch		In U.S.	
	guilders	dollars	guilders	dollars	High	Low	High	Low
June 3	34.75	33.75	9.18	8.91	17.75	17.25	4.69	4.56
June 17	35.00	1/	9.24	1/	18.00	1/	4.75	1/
June 24	39.50	1/	10.43	1/	20.25	1/	5.35	1/
July 1	40.00	1/	10.56	1/	22.00	21.00	5.81	5.55
July 15	46.25	1/	12.21	1/	24.00	1/	6.34	1/

1/ Only one sale was made.

Source: Reports from the trade.

The highest retail prices for single-strength Florida juices in the Netherlands in August 1953 (table 36) were about 20 percent higher than in 1952, owing to the increase in the price of citrus juices in the United States. Grapefruit juice, for instance, which cost about 82 cents per case net in Florida in 1952, cost 1.50 in 1953. This increase in price more than offset the effect of a drop in the exchange dollars to 5.20 guilders in 1952 to 4.20 guilders in 1953.

A No. 2 can of citrus juice selling at about 0.60 guilders, or 16 cents, on Netherlands markets competes with several cheaper juices from local fruits (table 36). These products, of course grow more competitive as citrus juices increase in price.

Retail sales for single-strength citrus juices are reported to be much slower in 1953 than in 1952 and 1951. Orange juice imported in 1951 was for sale in 1953 in some retail stores at prices below the 1953 import cost. Apparently the quality of single-strength juice has not pleased some Netherlands customers.

Despite the slow domestic market for juices, Netherlands importers were able to bring in large quantities of juice in 1953 for re-export. Trade sources indicate that more than two-thirds of United States citrus juice shipments to the Netherlands were resold to other countries. In this transit business, Germany was the largest customer, whose purchases were divided about evenly between grapefruit and orange juices. Largest sales to Germany in 1952 are reported to have been made in winter, for health reasons.

The only frozen juice observed on the retail market in August was a Spanish juice 7-1/4 times concentrated; put up in 100-gram (3-1/2 ounce)

tubes. The juice is shipped in a wooden box containing 25 tubes. Although it is reported to be of better quality than single-strength juice, only a few shops have this product for sale and sales are still small at a price of 1.60 guilders, or 42 cents per tube.

Table 36. - Retail prices for processed citrus products and for local fruit juices, the Netherlands, August 1953

Product	Unit		Price	
		In Dutch	In U.S.	
		guilders	cents	
Citrus products:		:	:	:
Single-strength juice,		:	:	:
from Florida:		:	:	:
Unsweetened:		:	:	:
Orange.....	No. 2 can	0.49 - 0.60	13 - 16	
Grapefruit.....	No. 2 can	0.49 - 0.58	13 - 15	
Orange-grapefruit blend.	No. 2 can	0.60	16	
Grapefruit sections....	No. 2 can	0.98 - 1.25	26 - 23	
from Japan:		:	:	
Tangerine sections, in		:	:	
syrup.....	310-gram can	0.92	24	
from Spain:		:	:	
Frozen concentrated		:	:	
orange juice.....	100-gram tube	1.60	12	
Local fruit juices:		:	:	
Apple.....	9-oz.bottle	0.25	7	
Red currant.....	12-oz.bottle	0.50	13	
Black currant.....	12-oz.bottle	0.65	17	
"Red berry".....	12-oz.bottle	0.70	18	
		:	:	

1/ Approximately 65° Brix, or 7-1/4 times concentrated.

Source: Observations of author in retail markets.

Some Florida frozen juice was imported in 1953, primarily as an experiment. This juice is reported to have arrived in good condition. Apparently none of it was sold retail; and sales to institutions are reported to be slow. Lack of refrigeration in homes suggests that any immediate outlet for frozen juices will be such places as restaurants and institutions. Development of a market for frozen juices will probably be a slow, expensive program, one that could be aided by introductory merchandizing supported by the United States industry.

Outlook

Retail sales of single-strength citrus juice in the Netherlands in 1953 were smaller than in 1951 and 1952. The sale of old imports at less than the 1953 cost indicates that in some retail outlets citrus juice may be a close-out item. From the stocks in hand it would seem that less

citrus juice will be imported into the Netherlands in 1954 than was imported in 1951 and 1952. Retail sales will be stimulated to some extent if prices can be kept low.

Like most other Europeans, Dutch consumers prefer fresh fruit and fresh juice. Sales of canned juices might be stimulated by advertising in women's magazines, stressing the economical and health-giving features of these juices. Some large retailers believe that demonstrations at points of sale and fairs might also be of assistance in breaking down resistance to canned products.

The most important outlet for imports in the Netherlands will probably continue to be the transit business, which is likely to increase as economic conditions in Western Europe improve.

Norway

Demand for citrus fruits is increasing in Norway. In 1953, from February 16 to June 30, the Government permitted oranges from Italy and Spain to enter without restriction, and thus made the first test of the demand for citrus since the war. 1/ From January through June, 50,017 metric tons, or 1,575,250 boxes of citrus fruit was imported, primarily oranges from Spain. The trade was surprised at the demand; this large volume of imports was sold without difficulty. In August only a few lemons and old grapefruit were available in Norway; obviously even the large imports through June were inadequate to meet the increasing demand. By the end of 1953, total citrus imports for the year are certain to be twice the 895,000 boxes imported in 1938.

Total citrus imports into Norway, though they have increased at a more rapid rate than either the industrial-production index or the gold and dollar holdings, do reflect modest increases in both (table 37). Industrial activity has increased in Norway since 1949, but not so much as in some other European countries, such as Germany. In Norway, however, an industrial index may be less of a measure of economic well-being than in Germany. That gold and dollar assets have not shown more substantial increases, is the most important factor in the continued restriction of citrus imports from the United States. Although currency restrictions will probably continue to make free imports of United States citrus and citrus products impossible, there are indications that imports may be made by means of barter.

If imports from the United States were permitted, Norwegian markets could easily absorb 300,000 boxes of summer citrus and 25,000 cases of citrus juices.

1/ Report by George J. Dietz, Assistant Agricultural Attaché,
United States Embassy, Oslo.

Table 37. - Industrial-production index and gold and dollar holdings in Norway compared with that country's total imports of oranges and with United States exports of oranges to Norway, 1938 and 1948-53

Year	Industrial- production index (1948=100)	Gold and dollar holdings, December	Total orange imports	United States exports of oranges
		Million dollars	1,000 boxes	1,000 boxes
1938	80	99	895	2/ 133
1948	100	130	265	
1949	108	120	308	3/ 1
1950	117	94	508	2
1951	123	150	542	2
1952	123	160	785	2
1953	4/	5/ 164	4/	4/

1/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

2/ 1935-59 average.

3/ 1945-49 average.

4/ Not available.

5/ As of June.

Source: Index and holdings, Mutual Security Program, Reports to Congress; imports, official Norwegian sources; exports, U.S. Bureau of the Census.

Market for Fresh Citrus Fruit

The increased use of citrus fruit in Norway is probably the result of two factors: First, a real change in food preference; and, second, improved economic conditions. Importers point out that before the war fishermen and farmers purchased only a few oranges for Christmas, but now they find themselves in improved economic circumstances and want to consume fruit, including citrus and bananas, the year around.

Because of rain at the time when apple and plum trees were in bloom, the crops of these domestic fruits were short in 1953; and the short supply resulted in high prices, such as 3.60 crowns per kilo, or 23 cents per pound, for orchard-run medium-size green apples (table 38). The fruit farmers have enough political strength to prohibit the import of cheaper fruit. Considering that the average Norwegian earns only about \$100 per month, these prices are indicative of the great demand for fruit which, if supplies were available, would be reflected in much higher consumption.

Table 38. - Retail prices for fruits in Oslo,
September 1953

F r u i t	In	In
	Norwegian	U. S.
	crowns	cents
	per kilo	per pound
Lemons.....	2.30 - 3.80	15 - 24
Apples:	:	:
Small, poor..	2.10	13
Medium-size		
orchard run	3.60	23
Plums:	:	:
Dark.....	3.80	24
White.....	3.50	22
Bananas	:	:
(on ration)..	3.60	23
	:	:

Source: Observations of the author in retail markets.

As a result of the short apple crop and the increased desire to consume citrus, imports in the 1953-54 season will probably increase again if imports from Spain and Italy are free of restriction. Total citrus imports in 1953 will probably be about 1.8 million boxes and in 1954 may exceed 2 million boxes.

Market for Processed Citrus Products

Norway is beginning to use citrus juices and, if imports could be made, would be a market for bottlers' bases and single-strength juices.

No canned citrus juices were available in Norway in the fall of 1953, but marmalades and bottled citrus juices were. One firm sells Spanish orange and lemon juices attractively packaged in bottles containing about 20 ounces of juice. They are 2 to 1 concentrates preserved with sugar and sulfur dioxide, and both juices have a good color. The plastic screw top of the lemon-juice bottle contains a small glass vial of lemon oil to be added to the juice as the drink is prepared; the orange juice is packaged without the essential oil. The orange juice retails for 4.40 crowns or 62 cents per bottle; the lemon for 4.00 crowns, or 56 cents. A cocktail mixer of a "squash" type is also available. The quality of these products could satisfy only those consumers who have never tasted single-strength canned juices.

Bottled citrus-flavored soft drinks continue to be sold in large volume.

Trade sources report that the jam industry is interested in citrus pectin.

It was interesting to note that most of the larger retail food shops had frozen-food cabinets and were selling such items as frozen fish, vegetables and berries.

Sweden

The index of industrial production in Sweden, which has shown a fairly steady increase in recent years, is reflected in an increase in imports of oranges (table 39). Gold and dollar holdings, the most important factor in appraising the outlook for imports of United States citrus and citrus products, also have shown a steady improvement, from 160 millions in 1949 to 282 millions in May 1953. Even with this marked improvement, however, the holdings in 1953 are still well below those in 1938.

In 1953 all United States citrus fruit imported into Sweden was purchased with dollars obtained through barter or by purchase of dollars at a premium, so-called "Argentine dollars." Both were expensive means of obtaining dollars, a fact that was reflected in the high cost of United States fruit. Trade sources report that the "Argentine dollar" in 1953 cost about 6.75 crowns, compared to the official rate of 5.18 crowns. In other words, dollars could be had, but at a 30-percent premium.

In 1954 this trade pattern will probably change: some dollars for fruit imports may be earned through barter, but "Argentine dollars" probably will not be available. Some importers express the hope, based on the improved dollar position of the country, that the Swedish Government will relax its import controls to some extent in 1954 and issue import licenses for some citrus from the United States; no importer, however, thinks that trade will be free.

If official-rate dollars are available for some imports in 1954, the prices of fruit and canned juices will be lower and will stimulate consumption. Thus imports of United States products will increase over those in 1953, even though some of the imports may have to be made by the premium dollar. In that case, some fruit imported with the more expensive dollars will have to compete with the cheaper fruit that is imported with dollars obtained at the official rate of exchange.

The Swedish trade is much interested in being able to import United States citrus fruits and products purchased with the Swedish crown.

Fresh Citrus Fruit

Consumption of oranges seems to be still increasing in Sweden. Imports, though already twice as large as in 1938, will probably continue to increase and may exceed 3 million boxes in 1954.

Table 39. - Industrial-production index and gold and dollar holdings in Sweden compared with that country's total imports of oranges and with United States exports of oranges to Sweden, 1938 and 1948-53

Year	Industrial- production index (1948=100)	Gold and dollar holdings December	Total orange imports	United States exports of oranges 1/
		Million dollars	1,000 boxes	1,000 boxes
1938..	67	420	1,338	2/ 95
1948..	100	130	1,394	2/ 180
1949..	105	160	1,989	
1950..	110	205	2,352	-
1951..	114	224	2,624	26
1952..	113	275	2,823	183
1953..	4/	5/ 282	4/	4/

1/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

2/ 1935-39 average.

3/ 1945-49 average.

4/ Not available.

5/ As of May.

Source: Index and holdings, Mutual Security Program, Reports to Congress; imports, official Swedish sources; exports, U. S. Bureau of the Census.

Winter oranges will undoubtedly be imported in 1954 at the same high level as in recent years. In addition, Sweden enjoys the blood oranges from Spain, when they are available, in the spring. This market requires larger fruit than other European markets do. Most desirable selections seem to be size 238 and larger; about 10 percent are size 238; the rest are larger.

The trade commented that the Valencia oranges received from California in 1953 have been better liked than those received in 1952; not only has the quality been superior, but the fruits have been larger. Trade sources report that when South African Navel and California Valencias have been in the market at the same time, California fruit has brought about 5 crowns, or 95 cents, more per box wholesale than South African fruit did. Some independent California brands have been well received in Sweden in 1953.

In September 1953 Sweden was well supplied with beautifully displayed fruits. At the retail prices then observed (table 40), the summer oranges and grapefruit from South Africa, though rather expensive, were still cheaper than any other fruit of comparable quality. Some California oranges were for sale in Sweden in September, but none were observed in retail shops. Reports indicate, however, that the retail price was about the same as that of the South African citrus noted here.

Table 40. - Retail prices for citrus fruit and other fruits and vegetables in Sweden, September 1953

Item	: In Swedish crown per kilo	: In U.S. cents per pound
Citrus fruit:	:	:
Oranges, South African Valencias	: 1.95	: 17
Grapefruit, South African (small)	: 2.00	: 18
Lemons, Italian (large).....	: 2.75	: 24
Bananas.....	: 2.35	: 21
Apples.....	: 2.25 - 2.70	: 20 - 24
Peaches, Italian.....	: 3.00	: 26
Pears, poor (small).....	: 3.50	: 31
Plums, (large).....	: 2.50	: 22
Grapes, white (large).....	: 5.50	: 48
Tomatoes.....	: 3.00	: 26
	:	:

Source: Observations of author in retail markets.

Importers pointed out that one reason for the increase in the consumption of oranges is the fact that they are cheaper than pears and the best quality apples. Even in January and February, when apples are in large supply, Spanish oranges sold retail for about 1.25 crowns per kilo, or 11 cents a pound, and the better Swedish apples sold for about 1.50 crowns per kilo, or 13 cents per pound. Lower quality apples were cheaper.

In Sweden as in other European countries the local apple industry is protected by trade restrictions and tariffs. These protectionist devices have the effect of raising the prices of domestic apples and making them less competitive with oranges than they would otherwise be. Some importers express the opinion that growing apple production may make future apple prices lower and more competitive with citrus. For the present, however, citrus fruit may be favored by the fact that Sweden has had a smaller apple crop in 1953-54 than in 1952-53.

Comments from importers indicate that the demand for grapefruit in Sweden is declining and that sales are becoming smaller and more difficult

to accomplish. One reason for this lag may be the increased use of canned single-strength grapefruit juice. In September 1953 a 20-ounce can cost 1.45 crowns, or 28 cents, compared with 2 crowns per kilo or 18 cents per pound for fresh South African grapefruit.

The Swedish market likes pigmented grapefruit, and imports of pink fruit from Texas in the spring of 1953 were successfully marketed even though they sold retail for nearly twice as much as non-United States white grapefruit. Imports of Florida pink grapefruit, made later in the season, are reported to have been less successful, and some of that fruit was sold below import cost. Importers commented that Texas fruit had better keeping qualities this year than the Florida fruit, a difference that may have been partly a matter of season.

Processed Citrus Products

A wide range of processed citrus products were available in retail stores in Sweden in the early fall of 1953. Florida citrus juices dominated the market but grapefruit juice from the West Indies was also available in many stores. Grapefruit juice is preferred to orange juice, and most juices seen were sweetened. The retail prices for juices are very high (table 41), at least twice those in Belgium and the Netherlands, and are a result of premiums that have to be paid for the dollars with which to make imports. Retailers who were interviewed stated that customers preferred Florida juice when it could be obtained. An indication of the preference was seen in one shop where the price of a No. 2 can of Trinidad grapefruit juice had been reduced from 1.60 crowns, or 31 cents, in January to 1.45 crowns, or 28 cents, in September and was to be further reduced to 1.35 crowns, or 26 cents, in October.

Demonstrations and advertising at point of sale would aid in developing use of citrus juices; but the greatest aid to increased consumption would be lower prices, which can be brought about only by less restricted imports.

Frozen concentrated orange juice from Florida in a 6-ounce can bearing a Swedish label was available in some shops at the high price of 1.75 crowns, or 34 cents. Retailers report that customers like the quality of the product but that, since the concentrate is expensive and is not yet well known, sales are small and likely to remain so in the immediate future. In fact, it is reported that at the present rate of consumption the small quantity of frozen juice imported in 1953 may last several years.

Some retailers express the opinion that a smaller can might be useful in introducing the frozen concentrate. Attempts are being made to interest cafes and hotels in serving the product, but management tends to cling to traditional methods and products. In at least one hotel in Stockholm, frozen concentrated orange juice from Florida is available, and cards advertising it have been placed in the rooms. The concentrate has also been offered to workers in factories by making it available in counter dispensers. But here, too, reception of the product is slow.

Table 41. - Retail prices for processed citrus products in Sweden,
September 1953

Product and source	Size of can	Retail price	
		In Swedish crowns	In U.S. cents
Single-strength juices:		:	:
Orange, sweetened (Florida)	20 ounces	1.50	29
Grapefruit:		:	:
Sweetened (Florida).....	(20 ounces	1.45	25
Unsweetened:	46 ounces	3.50	68
Florida.....	12 ounces	1.65	32
Trinidad.....	20 ounces	(1/ 1.60	(1/ 31)
Blended (Florida).....	20 ounces	(1.45	(28)
Frozen concentrated orange juice (Florida).....	6 ounces	1.75	34
Grapefruit sections:		:	:
Sweetened:		:	:
Israel.....	20 ounces	2.50	48
Florida.....	16 ounces	2.10	41
Unsweetened (Florida).....	8 ounces	1.95	38
Orange and grapefruit sections (Florida).....	16 ounces	3.25	63
Tangerine sections (Japan, with label of U.S. firm)...	11 ounces	2.25	43

1/ Price in January 1953.

2/ Price in October 1953.

Source: Observations of author in retail markets.

Trade sources indicate that there have been some efforts made to develop a source of frozen concentrated juice in the Mediterranean. But the cost of tinplate, the lack of home refrigeration in Europe, and the small potential market in the near future do not seem encouraging for the large investment necessary to begin producing this juice in the Mediterranean.

An important factor for United States exporters to keep in mind in their plans for selling frozen concentrated juice in Sweden is the uncertainty of the future availability of dollars. As long as this uncertainty continues, it is unwise for anyone to expend large sums on advertising and promotion to develop a market he may be unable to supply.

Grapefruit sections from both Florida and Israeli were available on the Swedish market in September 1953. The Israeli product is reported to be of good quality, but the labeling is unattractive and arouses consumer resistance.

Tangerine sections from Japan were also observed for sale under a well-known American brand.

Switzerland

Imports of citrus fruit into Switzerland from the United States have been steadily increasing since 1949. The country has long been in a strong financial condition (table 42). Gold and dollar holdings are more than double what they were in 1938; what is more, they are double those of Belgium and France and 300 million dollars larger than those of the United Kingdom. The Swiss franc is freely convertible into dollars.

Actually, Switzerland has imported more United States oranges than table 42 shows; the figures given there represent exports from the United States and do not take into account the United States fruit purchased through other European countries, primarily Belgium and the Netherlands.

Market for Fresh Citrus Fruit

Swiss importers of fresh fruit have had a good season in 1953. They comment on the excellent quality of the California oranges they have received, a quality that has permitted competitive sales with South African fruit even as late as September. It is unusual for California oranges to be exported that late in the year.

Although a large crop of oranges in Italy will probably keep supplies abundant in Switzerland in winter, importers believe that imports of United States oranges in summer will be maintained at recent levels. Advertising in newspapers is said to have improved sales possibilities.

Orange supplies from Italy continue to be received in bulk primarily because of the savings to be had when duty is levied on gross weight. For this reason, packed fruit from Italy would find it difficult to compete with the cheaper fruit that has been imported in bulk.

The Swiss like pigmented grapefruit and switzerland is one of the largest consumers of grapefruit in Europe. The quantity of United States grapefruit that might be imported during the winter will depend on the cost and freight price. Florida and Texas grapefruit is said to be preferred to that from Israel, that is, if prices are equal.

Very few California lemons were imported into Switzerland in 1953, but those received were in the standard 2-compartment box. It is the opinion of Swiss importers that the half-box carton treated with diphenyl does not appeal to the Swiss customers who like to use lemon peel in cooking.

In November, prices of fresh grapefruit in Zurich were equal to the prices of oranges (table 43). At this season of the year, citrus prices are unusually high since orange supplies are limited. Despite the fact that apples were plentiful, large fancy apples were more expensive than the imported citrus fruits.

Market for Processed Citrus Products

Most of the citrus juice consumed in Switzerland is used as a between-meals drink in summertime and not as a part of the breakfast menu. For that

reason, importers say, the cold summer weather in 1953 may have been partly responsible for the slower fruit sales at that time. Fresh citrus is available the year around in Switzerland, and it is the opinion of some products importers that many consumers still prefer fresh fruit and few drink juice. In November 1953 old stocks of juice were still in the hands of importers and were being offered wholesale at approximately 0.60 Swiss franc, or 14 cents, per No. 2 can; this was less than the estimated cost for importing the 1953-54 Florida juices at the opening quotations - 0.67 franc, or 16 cents.

Table 42. - Gold and dollar holdings in Switzerland compared with that country's total imports of oranges and with United States exports of oranges to Switzerland, 1938 and 1948-53 1/

Year	Gold and dollar holdings, December	Total orange imports	U.S. exports of oranges 2/
	Million dollars	1,000 boxes	1,000 boxes
1938..	918	720	3/
1948..	1,886	1,563)	4/ 72
1949..	2,021	1,496	
1950..	2,023	1,568	77
1951..	1,973	1,848	105
1952..	2,053	1,336	111
1953..	5/ 2,053	6/	6/

1/ For all other countries in this report the industrial-production index, too, has been compared. For Switzerland, however, data on that index were not available.

2/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

3/ Nominal; not reported separately.

4/ 1945-49 average.

5/ As of May.

6/ Not available.

Source: Index and holdings, Mutual Security Program, Reports to Congress; imports, official Swiss sources; exports, U. S. Bureau of the Census.

Switzerland has abundant supplies of local grape and apple juice, which is sold pasteurized in bottles at prices well below those for the imported canned citrus juices (table 44). Some California single-strength orange juice was being sold at slightly higher prices than were being asked for Florida orange juice. Frozen orange concentrate is being sold in large retail outlets at widely differing prices. The organization that is selling a 6-ounce can of frozen concentrate for 0.95 franc, or 22 cents, is doing an excellent job of newspaper advertising on the theme that at this

price the frozen juice is much cheaper than fresh juice. The advertisements say that it would require 2 kilos, or 4 pounds of oranges to make as much juice as is contained in a 6-ounce can; that at November prices the fresh oranges would cost 2.80 francs, or 65 cents, compared with 0.95 francs, or 22 United States cents, for the frozen juice. Despite the excellent merchandizing and the reasonable prices, however, frozen juice still sells rather slowly.

A new product was observed for sale in retail stores in 1953, a Spanish hot-pack concentrated orange juice sold in tubes. It is 7-1/4 times concentrated or approximately 65° Brix.

Table 43. - Retail prices for citrus fruit and for other fruits and vegetables in Zurich, November 1953.

Item	: In Swiss francs per kilo	: In U.S. cents per pound
Citrus fruit:	:	:
Oranges:	:	:
Small (Spain).....	: 1.30 - 1.50	: 14 - 16
Valencias (South Africa)	: 1.45 - 1.85	: 15 - 20
Grapefruit (Florida):	:	:
White.....	: 1.60	: 17
Pink.....	: 1.60	: 17
Tangerines (Spain).....	: 1.40	: 15
Lemons.....	: 1.25 - 1.40	: 13 - 15
Apples:	:	:
Ordinary.....	: 0.65 - 0.85	: 7 - 9
Large fancy.....	: 1.80	: 19
Pears (fair quality).....	: 0.95	: 10
Grapes, white.....	: 1.90	: 20
Bananas.....	: 2.30	: 24
Tomatoes (large).....	: 1.28	: 13

Source: Observations of the author in retail markets.

There seem to be opportunities for increasing the imports of bottlers' bases in Switzerland; and some importers would be interested in new formulas. The country's soft-drink industry is expanding, and citrus is a popular flavor. Importers report that 5 out of 6 consumers in urban areas prefer grapefruit flavor to orange. In rural areas grapefruit is also a favorite, but the preference is not so marked. Switzerland has high standards of quality for its soft-drink industry, a fact that offers an advantage to United States producers of bottlers' bases. Because of the higher duties on items containing sugar, United States exports of bottlers' bases, like those of single-strength juices, should not contain sugar.

Table 44. -- Retail prices for processed citrus products and for apple and grape juice in Switzerland, November 1953

Product	Unit	Retail price In Swiss francs	In U.S. cents
Single-strength juice, unsweetened:		:	:
Orange:		:	:
Florida.....	20-ounce can	0.95	22
California.....	20-ounce can	1.00	23
Grapefruit, Florida	20-ounce can	.85	20
Concentrated orange juice:		:	:
Frozen, Florida.....	6-ounce can	(0.95 1.80)	(22 42)
Hot-pack, Spain 1/...	90-gram tube	0.37	20
Apple juice (pasteurized):	1-liter bottle	0.70 - 0.75	16 - 17
Grape juice (pasteurized):	1-liter bottle	1.20 - 1.50	28 - 35
		:	:

1/ Approximately 65° Brix, or 7-1/4 times concentrated.

Source: Reports from the trade, and observations of the author in retail markets.

The United Kingdom

The most important factor in the United Kingdom's continuing restrictions against United States citrus and citrus products is the fact that gold and dollar holdings, which had risen to 3.3 billion dollars in 1950, had fallen to nearly half that figure in 1952 (table 45). Industrial production, too, had fallen between 1951 and 1952. With both these economic factors, total imports of oranges show a fairly close correlation; they too declined in 1952.

The most encouraging factor in the outlook for United States citrus exports is the 500-million-dollar increase which the United Kingdom made in its gold and dollar holdings since the end of 1952.

Market for Fresh Citrus Fruit

In 1952 the United Kingdom imported from Spain, South Africa, and Israel 10 million boxes of oranges, 6 million boxes less than it imported in 1938. Although total imports in 1953 may be slightly larger than in the preceding year, they will still be much smaller than they were in prewar years. Thus the pattern of orange imports in the United Kingdom is different from that in Continental Europe, where average imports for each country have at least doubled. The United Kingdom, by contrast, seems to be under-supplied with fresh oranges.

Table 45. - Industrial-production index and gold and dollar holdings in the United Kingdom compared with that country's total imports of oranges and with United States exports of oranges to the United Kingdom, 1938 and 1948-53

Year	Industrial production index (1948=100)	Gold and dollar holdings, December	Total orange imports 1,000 boxes	U.S. exports of oranges 1/ 1,000 boxes
		Million dollars		
1938	83	2/	16,551	3/ 834
1948	100	1,836	14,627	
1949	107	1,688	9,596)	4/ 4
1950	116	3,300	10,551	2
1951	120	2,335	12,564	-
1952	115	1,846	10,316	-
1953	2/	5/ 2,367	2/	2/
		:	:	:

1/ Beginning with 1950, the exports are for crop years, reaching back to the preceding November. Thus, for exports, 1950 means 1949-50; 1951 means 1950-51, etc.

2/ Not available.

3/ 1935-39 average.

4/ 1945-49 average.

5/ As of June.

Source: Index and holdings, Mutual Security Agency, Reports to Congress; imports, official United Kingdom sources; exports, U. S. Bureau of the Census.

Considering the fact that supplies of oranges are still far below normal in the United Kingdom, it is interesting to note the drop in prices that occurred on the London Fruit Exchange in late August and early September 1953 (table 46). In 2-1/2 weeks' time some kinds of oranges dropped nearly \$3.00 per box.

This sudden decrease, which reflected consumer resistance to high citrus prices, occurred at the time of year when citrus fruits in the United Kingdom meet maximum competition from soft fruits (table 47). For instance, Italian peaches were in plentiful supply and of good quality and, after the drop, retailed at about the same price as oranges; many consumers preferred the peaches since they were available at such prices for only a short time. Apple prices, incidentally, were high considering the inferior quality of the fruit; the small red apples selling at 10 pence, or 12 cents per pound, were nothing more than cider apples.

Table 46. - Prices for fancy grades of California, South African, and Brazilian oranges, sizes 252 and 288, on the London Fruit Exchange on specified days, August and September 1953

Date and fruit	Size 252		Size 288	
	Sterling	U.S. dollars	Sterling	U.S. dollars
	per box	per box	per box	per box
August 24:	:			
California Valencias :	56/-	7.87	56/-	7.87
South African Valencias	48/-	6.74	49/-	6.88
Brazilian Peras.....	41/6	5.63	40/-	5.62
August 26:	:			
California Valencias :	54/-	7.59	52/-	7.31
South African Valencias	46/-	6.46	45/-	6.32
Brazilian Peras.....	39/-	5.48	40/-	5.62
September 9:	:			
California Valencias :	35/-	4.92	33/6	4.71
South African Valencias	32/6	4.57	31/6	4.43
Brazilian Peras.....	29/6	4.14	28/-	3.93
	:			

Source: Auction catalogs of the trade. Figures are modal averages.

Table 47. - Retail prices for citrus fruit and for other fruits and vegetables in London, September 1953

F r u i t	Unit	Retail price	
		In sterling	In U.S. cents
Citrus fruit:	:	:	:
Oranges:	:	:	:
South African Valencias, size 176	Each	3 pence	3
Brazilian Peras, size 288.....	7 fruits	1 shilling	14
Lemons, South African, small.....	5 fruits	1 shilling	14
Grapefruit, South African, large...	Each	6 pence	7
Other fruits:	:	:	:
Peaches, Italian, small.....	Each	4 pence	4
Apples:	:	:	:
Red, New Zealand.....	Pound	1 shilling	14
Red, small and poor.....	Pound	10 pence	12
Green, local.....	Pound	9 pence	10
Plums:	:	:	:
Yellow.....	Pound	10 pence	12
Blue.....	Pound	1 shilling	14
Grapes, white, imported.....	Pound	1 shilling	
		6 pence	21
Tomatoes.....	Pound	8 pence	9
		:	:

Source: Observations of the author in retail markets.

The price drop in citrus fruit at that time is an indication that the market in the United Kingdom is "thin," for any increase in the amount of fruit on the market brings immediate reductions in price. Apparently consumers do not have the purchasing power to absorb any great increase in the supply of fruit. With high taxes and rising costs of such essentials as transportation and basic foods, and with average wages about 9 to 10 pounds, or \$25 to \$28, a week, many people do not have much money to spend on fruit.

The experience of Israeli exporters of citrus in the United Kingdom market indicates further the weakness of the market at present. In 1952 Israel marketed in England about 2.2 million boxes of citrus; in 1953 about 3.3 million. The increased volume in 1953 resulted in lower prices; the gross price per box was down 9 shillings, or \$1.26 and the net returns were down 6 shillings, or 84 cents. At the time the Israeli fruit was sold, supplies on the market were not excessive compared either with prewar imports into the United Kingdom or with the quantity being consumed on the Continent.

South African exporters had a similar experience in the 1953 season. At the beginning of the season, the South African marketing organizations estimated that the crop would be smaller than in 1952. Therefore the Continental fixed price, c.i.f. channel ports, rose to 36 and 37 shillings, or \$5.06 and \$5.20 per box, virtually pricing South African fruit out of the Continental market. As the season progressed, it became apparent that the 1953 crop would equal or even exceed the 1952 crop; as a result, with less fruit being shipped to the Continent, larger quantities were available for the United Kingdom.

As a result of the larger shipments to the United Kingdom, prices of South African oranges on the London auctions in 1953 were about 10 shillings, or \$1.40, less per box than they were in 1952 (table 48). Even so, the prices obtained in 1953 are still high; the lowest of them bring excellent returns to South African growers.

One of the factors in the high returns is the fact that South Africa enjoys more favorable freight rates than any other citrus-producing country. In 1953 it paid, for refrigerated stowage to the United Kingdom, 5 shillings 9 pence, or 80 cents, for a 70-pound box net weight. Israel, in comparison, for a distance only half as great and for only ventilated stowage, paid 5 shillings, or 70 cents. The South Africans claim that their freight rate is not subsidized and that it is low merely because the merchant ships unloading in South Africa find citrus and other fruits a remunerative cargo for the return trip; ships serving the Pacific Coast do not always have such an advantage inasmuch as cargoes from Europe to California are not always available. South African shippers also point out that they have a 10-year contract and that on this long-term basis the shipping company can afford to make concessions.

Table 48. - Prices for fancy-grade South African oranges, size 176, on the London Fruit Exchange on specified days, June-October 1952 and June-September 1953

Date	1952		Date	1953	
	In sterling	In U.S. dollars		In sterling	In U.S. dollars
	per box	per box		per box	per box
June 4.....	57/6	8.08	June 3.....	44/3	6.22
June 11.....	57/6	8.08	June 10.....	46/6	6.53
June 18.....	52/6	7.38	June 17.....	47/9	6.71
June 25.....	50/9	7.13	June 24.....	41/6	5.83
July 2.....	56/-	7.87	July 1.....	39/3	5.52
July 9.....	59/-	8.29	July 8.....	42/-	5.90
July 16.....	59/-	8.29	July 15.....	45/6	6.39
July 23.....	58/3	8.19	July 22.....	43/6	6.11
July 30.....	60/-	8.43	July 29.....	46/9	6.57
August 6.....	60/9	8.54	August 5.....	44/9	6.29
August 13....	60/-	8.43	August 12....	47/6	6.67
August 20....	49/-	6.88	August 19....	48/-	6.74
August 27....	57/-	8.01	August 26....	47/-	6.60
September 3..	54/-	7.59	September 2..	38/9	5.45
September 10..	50/-	7.02	September 9..	35/9	5.03
September 17..	54/6	7.66	September 16..	33/9	4.75
September 24..	53/-	7.45		:	
October 1....	56/6	7.94		:	

Source: Auction catalogs of the trade and data supplied by M. Levin, Manager, Citrus Marketing Board of Israel in London.

In these low freight rates South African growers have a competitive advantage that is about the same as having a subsidy of the size recently paid under the Export-Payment Program of the United States Department of Agriculture. In 1953, these growers, even after paying charges, are getting high returns on a box of oranges (f.o.b. South African ports) at various London auction prices (table 49).

Table 49.--Returns to South African growers, f.o.b. South African ports, on a box of oranges sold in London at specified auction prices

Auction price	Charges			Estimated returns	
in Sterling	5-percent commission	Freight	Selling expense	In sterling	In U.S. dollars
35/-	1/9	5/9	2/-	25/6	3.57
40/-	2/-	5/9	2/-	30/3	4.24
45/-	2/3	5/9	2/-	35/-	4.90
50/-	2/6	5/9	2/-	39/9	5.57
55/-	2/9	5/9	2/-	44/6	6.23
60/-	3/-	5/9	2/-	49/3	6.90

With such returns, South African growers, who, as a result of trade restrictions are marketing fruit in the United Kingdom with little competition, have been getting more for their fruit than California growers selling in Continental Europe. In 1952 the average auction price for South African oranges in London was at least 50 shillings, or \$7.00 a box ^{1/}, giving the growers an estimated return of \$5.57 a box, f.o.b. South Africa. In comparison, the California grower got an f.o.b. return of not more than \$3.50 a box, including the export subsidy. In 1953, when prices for South African fruit on the London market were lower than in 1952, the average was at least 40 shillings, or \$5.60 per box - a price that gave the grower an estimated \$4.44, or about \$1.00 more than California growers got from their sales on the Continent. Even at the lowest prices given in Table 48 for 1953, on September 16 South African fruit returned to the growers more than \$3.00 per box, about the same as California growers received. Actually, returns in both years were probably somewhat higher than the conservative estimates given here.

In August and September 1953 the first California oranges in recent years were imported into the United Kingdom. The dollars for this fruit were obtained through a triangular deal whereby the United Kingdom Ministry of Food sold Moroccan sardines in Western Germany. These oranges brought premium prices compared with South African Valencias and Brazilian Peras (table 46). It should be kept in mind, however, that the California fruit was something new on the market and was sold in smaller volume than the other oranges; the premium prices might not be obtained under opposite circumstances.

In estimating the quantity of California Valencias that the United Kingdom would import if the Government made dollars available, one must remember that lack of consumer purchasing power might keep imports from being as high as they are on the Continent. United Kingdom importers calculate that for sales of any volume, United States oranges would have to be available, cost and freight, in the United Kingdom ports at about 30 shillings, or \$4.20, per box.

This import cost is about equal to the 1953 cost-and-freight price on the Continent for California oranges shipped under the United States Department of Agriculture's export-payment program. Thus, under such price and subsidy conditions as exist in 1953, California oranges could be exported to the United Kingdom at prices that, in the opinion of the British import trade, would make our fruit competitive and make volume imports possible. Our citrus industry might face a different problem if citrus had to be imported into the United Kingdom at a higher price.

Thus, if dollars were available for orange imports, the volume of imports would depend upon the price at which the fruit could be bought. In the opinion of the trade, a million boxes might be sold at a cost-and-

^{1/} This price is a little lower than is indicated in table 48, which gives prices for only size 176. The assumption is that the average fruit was somewhat smaller and so brought prices a few shillings lower.

freight price of 30 shillings, or \$4.20 per box; but perhaps only half a million could be sold at 35 shillings, or \$4.90.

United Kingdom grapefruit imports too are much smaller than they were before the war, are in fact only half as large. If dollars were available, perhaps as much as 1/2 million to 1 million boxes could be imported at cost-and-freight prices of, say, 25 shillings, or \$3.50. The United Kingdom is our one big potential outlet for fresh grapefruit; the other countries of Western Europe, even with no restriction on foreign exchange, probably would increase imports only by small amounts unless substantial price concessions were made.

Processed Citrus Products

The United Kingdom receives most of its single-strength citrus juices from South Africa, Israel, and the West Indies, the same sources that, besides the United States, supply the other countries of Western Europe. Retail prices in the United Kingdom (table 50) are about twice as high as in Belgium and the Netherlands, but retailers report that consumption is increasing. Most single-strength juices seen were sweetened.

Grapefruit juice from the West Indies is the most popular single-strength juice, for reasons of both quality and price; for orange juice, customers seem to prefer the Israeli product. Non-citrus juices--tomato and pineapple, for example--compete with the citrus; import cost quotations are given in table 51. It is interesting to note that the low prices for Malayan pineapple juice do not necessarily indicate that this juice is the best buy -- the trade considers it to be of the lowest quality.

These cost quotations are but another indication of the fact that United States citrus juices can compete successfully in world markets by virtue of both price and quality. In 1953 a case of Florida grapefruit juice could have sold at more than \$2.25 f.o.b. Florida ports and still been cheaper in the United Kingdom than the juice from Trinidad, which is of excellent quality and most competitive in price. And a case of orange juice could have sold at about \$3.00 f.o.b. United States ports and still had a lower cost-and-freight price in the United Kingdom than the most competitive orange juice.

Table 50. -- Retail prices for processed citrus products from specified sources, in London, September 1953

Product	Unit	Retail price	
		In	In U.S.
		sterling	currency
Single-strength juice:		:	
Orange:		:	
Israel.....	: 20-ounce can	: 1/9	\$ 0.25
Trinidad.....	: 20-ounce can	: 1/8	.23
South Africa.....	: 16-ounce can	: 1/7	.22
Grapefruit, Trinidad...	: 20-ounce can	: 1/4	.19
Lemonade, frozen concentrate 1/.....	: 6-ounce can	: 1/6	.21

1/ Processed in England from Italian fruit.

Source: Observations of author in retail markets.

Table 51. - Cost quotations 1/ for imports of citrus juices and other juices into the United Kingdom from specified sources, summer 1953

Juice and source	Size of can	Cost per case of 24 cans 2/	
		In sterling	In U.S. dollars
Citrus juices, single-strength:		:	:
Orange:		:	:
South Africa.....	: 20 ounces	: 29/-	: 4.07
Trinidad.....	: 20 ounces	: 25/6	: 3.58
Israel.....	: 20 ounces	: 28/8	: 4.02
Grapefruit:		:	:
Jamaica.....	: 20 ounces	: 19/6	: 2.74
Trinidad.....	: 20 ounces	: 19/-	: 2.67
Pineapple juice:		:	:
Australia.....	: 16 ounces	: 20/-	: 2.81
Australia.....	: (20 ounces	: 22/- to 23/-	: 3.09 to 3.23
South Africa.....	: 20 ounces	: 23/- to 25/-	: 3.23 to 3.51
Malaya.....	: 12 ounces	: 15/-	: 2.11
Fiji 3/.....	: (20 ounces	: 20/9 to 21/-	: 2.92 to 2.95
Fiji 3/.....	: 20 ounces	: 24/-	: 3.37
Tomato juice:		:	:
South Africa.....	: 16 ounces	: 18/- to 20/6	: 2.53 to 2.88
Australia 3/.....	: 16 ounces	: 22/- to 23/-	: 3.09 to 3.23
Israel.....	: 16 ounces	: 18/6	: 2.60
Jamaica 3/.....	: (20 ounces	: 23/-	: 3.23
Jamaica 3/.....	: 20 ounces	: 21/-	: 2.95

1/ C.i.f., except as noted.

2/ Prices are given in cases of 24 cans even though in the United Kingdom it is the trade practice to give quotations by the dozen.

3/ Landed cost.

Source: Reports from the trade.

All citrus juices imported into the United Kingdom are brought in by the trade, except those for the child-health program, which are brought in by the Ministry of Food. Some comment has been made that the Ministry will soon discontinue its imports of concentrated citrus juice, but there seems to be no indication that it will do so in 1954. The Ministry is always interested in improving the quality of the product served in the home; and any processor having an improved product, or a package suitable for dispensing small amounts of juice in the home may send samples to John Roberts, Welfare Foods Procurement Branch, Westminster House, Horse Ferry Road, London SW-1. Such samples are welcome.

The writer saw no grapefruit sections in the stores; apparently such supplies as had been obtained from Israel, the West Indies, and Africa had already been sold. The United Kingdom Ministry of Food still imports this product. Before the war the United Kingdom imported more than 35 million pounds of grapefruit sections and doubtless there is still a large demand for this product. If imports could again be made from the United States, probably as much as 750,000 cases of 24 No. 2 cans could be sold. This is a market that knows our product, but the allocation of dollars with which to make purchases is still the big problem. It is interesting to note that despite the large prewar sales of grapefruit sections, this product has not been included in the token import plan, under which some United States canned goods are imported in small quantities.

An interesting development in citrus marketing in the United Kingdom in 1953 has been the introduction of frozen lemonade concentrate, which is made in England from fruit imported from Italy. In September, when the writer visited the country, sales outlets were limited, for the product was still an experimental introduction. The price - 1 shilling 6 pence, or 21 cents, for a 6-ounce can - is low, considering the prices of single-strength orange and grapefruit juices; and retail sales are reported good. The early favorable sales, however, may not be a sound guide to the ultimate demand; one large retail store in the west end of London reports that most of its sales have been to Americans. But because the concentrate has been well received, both production and outlets will be expanded in 1954. The firm that makes the lemonade concentrate plans to make also frozen concentrated orange juice, from Spanish fruit imported in bulk. In general, the frozen-food business is expanding in the United Kingdom, and frozen products are for sale in most grocery stores.

In 1952-53 a concentrated orange juice, 65° Brix, is reported to have been purchased from Israel, Spain and the West Indies. In No. A 10 cans, the price for an imperial gallon was 30 to 32 shillings, or \$4.21 to \$4.50, f.o.b., port of shipment.

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